Advancement Resources

Donor Acknowledgement Report

Version 1.1: 3/26/2018
Version 1.2: 10/30/2018
Version 1.3: 8/7/2019
Version 1.4: 2/11/2019
Version 1.5: 09/21/2020
Version 1.6: 9/10/2021

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Donor Acknowledgement Report

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

How Gifts Are Recorded at WFAA

Donor and gift information is recorded in **ABE CRM**, the WFAA database of alumni, donors, and friends. Understanding how gift information is stored will assist you when interpreting the Donor Acknowledgement Report.

Constituents

Gifts are received from **constituents**. A constituent is an individual, corporation, organization, group, charitable fund, family trust, etc.

Each constituent has a record in ABE CRM. A constituent record is assigned a unique ID number and contains constituent contact information (address, phone number, email). If the constituent is a UW–Madison graduate, their degree information is also stored.

Revenue

Revenue is the payment record of a constituent gift. Revenue can be a pledge, a payment against a pledge, an outright gift, or a matching gift payment. Revenue is also known as a *hard credit*.

In accordance with IRS requirements, revenue must be recorded for the constituent who will receive the tax receipt. Consequently, **revenue is recorded in only one constituent record**.

When an individual gives a gift, the revenue is recorded in their record. When a couple gives a joint gift, revenue is recorded in one of the couple's records. When a family gives through a family foundation, the foundation is credited with the revenue.

Recognition Credits

For each gift, **recognition credits** (also known as *soft credits*) **are recorded for all constituents who are responsible for giving the gift**. A single gift may have multiple recognition credits.

When an individual gives a gift, they receive recognition credit in addition to the revenue credit. When a couple gives a joint gift, both receive recognition credit, but only one receives the revenue. If a couple gives a gift through their family foundation, the foundation and both members of the couple receive recognition credit, and the foundation receives the revenue.

How Gifts Are Represented in the Donor Acknowledgement Report

The Donor Acknowledgement Report lists gifts and the constituents (donors) who are given **recognition** credit for them.

The report provides an abundance of information. A detailed explanation of all data fields is provided in the **Donor Acknowledgement Report — Data Fields** section later in this document. For current purposes, we will concentrate on a small set of fields:

Revenue Transaction ID
A unique ID assigned to a received payment.

Recognition Amount
The recognition credit amount of the gift or pledge. (This may differ from the Transaction Amount in cases where part of the transaction is not tax deductible. An example is the value of a dinner for an event ticket purchase.)

Constituent ID, First Name, Last Name
Data about the constituent pulled from the ABE CRM database. Each constituent listed in the report is more commonly known as a **donor**.

Spouse ID, First and Last Name
When spouses/partners give a joint gift, this describes the spouse/partner.

Donor Directed Organization Name
This field contains data when a gift is made via a company, foundation, or charitable fund.

The following sections provide examples of different types of gifts and how they are represented in the Donor Acknowledgement Report.

Gift from an Individual

Chris Jones makes a gift of $100.

Here is the gift in the Donor Acknowledgement Report:

Revenue Transaction ID	Constituent ID	Constituent Last Name	Constituent First Name	Spouse ID	Spouse Last Name	Spouse First Name	Recognition Amount	Donor Directed Organization Name
rev-13451111	8-10445566	Jones	Chris				$100.00	

Gift from Spouses/Partners

The married couple (or couple in a life partnership) Mary and Chris Smith make a joint gift of $100. Here is the gift in the Donor Acknowledgement Report:

Revenue Transaction ID	Constituent ID	Constituent Last Name	Constituent First Name	Spouse ID	Spouse Last Name	Spouse First Name	Recognition Amount	Donor Directed Organization Name
rev-13458888	8-10145566	Smith	Mary	8-10496876	Smith	Chris	$100.00	

Gifts from spouses/partners are represented by a single, combined entry. Each spouse/partner has their personal information (e.g., name, degrees) included in the entry.

Criteria to determine Constituent/Spouse:

- Generally, the **Constituent** is the one who has been credited with the revenue.
- You can specify a preference of which donor should be considered the constituent (and not the spouse). See the **Generating the Donor Acknowledgment Report** section below.

Gift Made Through an Organization, Foundation, Charitable Fund, or Trust

If Gary Johnson owns ABC Company and makes a gift of $5,000 through the company, here is how the gift will appear in the Donor Acknowledgement Report:

Revenue Transaction ID	Constituent ID	Constituent Last Name	Constituent First Name	Spouse ID	Spouse Last Name	Spouse First Name	Recognition Amount	Donor Directed Organization Name
rev-13469999	8-10779456	Johnson	Gary				$5,000.00	ABC Company

If Gary is married to Lisa Johnson and they make a joint gift through the company, here is what appears in the report:

Revenue Transaction ID	Constituent ID	Constituent Last Name	Constituent First Name	Spouse ID	Spouse Last Name	Spouse First Name	Recognition Amount	Donor Directed Organization Name
rev-13469999	8-10779456	Johnson	Gary	8-1329611	Johnson	Lisa	$5,000.00	ABC Company

If Gary, Lisa, and Gary's brother Tom make a gift through the company, here is what appears in the report (note that these entries have a matching **Revenue Transaction ID**):

Revenue Transaction ID	Constituent ID	Constituent Last Name	Constituent First Name	Spouse ID	Spouse Last Name	Spouse First Name	Recognition Amount	Donor Directed Organization Name
rev-13469999	8-10779456	Johnson	Gary	8-1329611	Johnson	Lisa	$5,000.00	ABC Company
rev-13469999	8-10326814	Johnson	Tom				$5,000.00	ABC Company

Tom appears on a separate line because he is not a spouse/partner of Gary or Lisa.

Gifts made via organizations, foundations, charitable funds, or trusts are also subject to these revenue and recognition rules. In the above examples, you could substitute "ABC Foundation," "ABC Fund," or "ABC Trust" for "ABC Company."

New Pledges and Pledge Balance Amounts

Pledges made during the reporting period are included in the report. These have a description of **New Pledge**:

Revenue Transaction ID	Constituent ID	Constituent Last Name	Constituent First Name	Gift Type Description	Recognition Amount	Total Pledge	Pledge Balance Amount as of Report Date	Final Pledge Payment
rev-13862222	8-11123456	Woods	Paul	**New Pledge**	$1000.00	$1000.00	$1000.00	

Here is another example of a new pledge:

Revenue Transaction ID	Constituent ID	Constituent Last Name	Constituent First Name	Gift Type Description	Recognition Amount	Total Pledge	Pledge Balance Amount as of Report Date	Final Pledge Payment
rev-13107654	8-44416111	Brown	Meg	New Pledge	$500.00	$500.00	**$0.00**	

Note that the *Pledge Balance Amount as of Report Date* is **$0.00**. This indicates that the pledge was made during the reporting period, and since that time, payments have been made to fulfill the pledge. The *Final Pledge Payment* field is blank (the *Final Pledge Payment* field displays “Yes” only for the payment that fulfills the pledge).

A new pledge and an associated pledge payment may appear in the same report. Here are two examples (the data has been sorted by *Constituent ID*):

Revenue Transaction ID	Constituent ID	Constituent Last Name	Constituent First Name	Gift Type Description	Recognition Amount	Total Pledge	Pledge Balance Amount as of Report Date	Final Pledge Payment
rev-13862222	8-11123456	Woods	Paul	New Pledge	$1000.00	$1000.00	$800.00	
rev-13941874	8-11123456	Woods	Paul	Pledge Payment	$200.00	$1000.00	$800.00	
rev-13107654	8-44416111	Jones	Linda	New Pledge	$50.00	$50.00	$0.00	
rev-13210715	8-44416111	Jones	Linda	Pledge Payment	$50.00	$50.00	$0.00	Yes

Here we see that, **within the reporting period**, Paul pledged $1,000 and made a $200 payment toward that pledge. Linda made a pledge of $50 and fulfilled the pledge with a $50 payment.

Recurring Gifts

A Recurring Gift is a commitment from a donor to give regularly. Recurring gifts have no specific end date. When the commitment is made, a gift type of **Recurring Gift Initiation** is included in the report. The *Amount* field displays the expected amount for each gift. If the *Amount* field is $1.00, the gift amount is “open ended,” and the donor will decide the amount at recurrence time.

Postal mail reminders are sent to the donor at recurrence time. The reminder includes the name of the fund, the date of the installment, and the expected amount. (For “open ended” gifts, no amount is included.)

When a recurring payment is made, a gift type of **Recurring Gift Payment** is shown.

Anonymous Gifts

Anonymous gifts are included in the report, but “identifying” information (constituent IDs, names, addresses, degrees, etc.) is left blank.

Planned Gifts, Matching Gifts Claims, Informational Transactions, “Do Not Acknowledge” Gifts

These gifts **are not** included in the report. If you have questions about acknowledgement policies for these types of transactions, please reach out to your WFAA contact or email your question to the WFAA Help Center (*help@uwadvancement.org*).

Links in Report Data

Every row in the report data displays the **Revenue Transaction ID**, **Constituent ID, Spouse ID**, and **Fund Number** fields as hyperlinks:

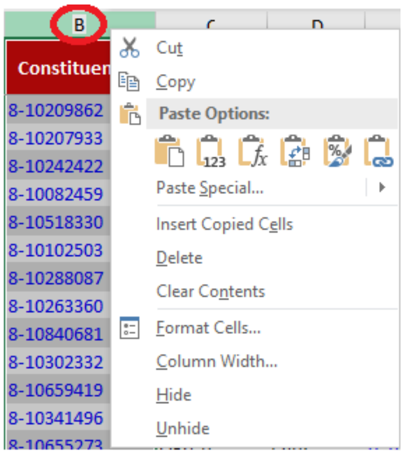
	A	B	C	D	E	F	G	H	I
	Revenue Transaction ID	Constituent ID	Constituent Last Name	Constituent First Name	Spouse ID	Spouse Last Name	Spouse First Name	Amount	Fund Name
1	rev-13469999	8-10779456	Johnson	Gary	8-1329611	Johnson	Lisa	$5,000.00	Bucky Fund

The links open a browser tab to display detailed information stored in ABE CRM. (The fund information link is inoperable to campus users.) If you open multiple tabs and one of them "times out" because of non-use, all ABE tabs will time out.

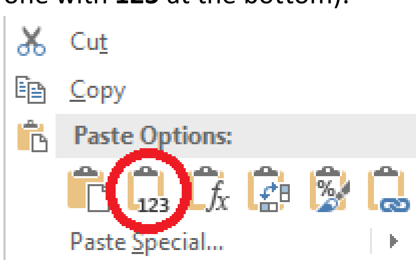
Attempts to use these fields in mail merges, or to take advantage of some Excel functions (like sorting) may fail. This is because the underlying data in these fields is a complex hyperlink, not the simple text displayed. To remedy these potential pitfalls, you will need to do a small bit of additional work.

The simplest approach is to replace the underlying hyperlink data with the displayed values. Here's how to do it:

- Do a right-click on the data column containing the hyperlinks. (In the example above, right-click **B** to select the **Constituent ID** column.) A pop-up menu will display:



- Select **Copy** from the pop-up.
- Do another right-click on the data column and **paste the values** by selecting the second "Paste" icon (the one with **123** at the bottom).



This replaces the underlying hyperlink data with the displayed values. (If you would rather not replace the data, you could create a new Excel column and paste the data there, but be sure to change the label in the column header!)

Advancement Resources Website

The Donor Acknowledgement Report is generated from the **Advancement Resources website**. This website provides a centralized and secure location to access fund information and generate fund reports.

Fund List & Information Page

The first step in generating the Donor Acknowledgement Report is to select one or more funds. This is done from the **Fund Reporting → Fund List/Information** page.

The resulting **Fund List & Information** page displays a list of funds:

Fund List & Information   Updated 11/21/2017

CONFIDENTIAL INFORMATION – Listed below are the funds you have access to.

Refresh Fund List   Filter Fund List

Fund Count: 67

	Fund Number	Fund Name	Unit	Department	Use	Fund Details
☐	112046329	Halls, Jay and Ruth Fund for WSUM	LET	Letters & Science Dean's Office	F	View
☐	112538080	Evjue Foundation #3 Letters & Science Bascom Professorship Fund	LET	Letters & Science Dean's Office	A	View
☐	112540335	Chazen, Jerome and Simona Endowment Fund	LET	Letters & Science Dean's Office	P	View
☐	112540950	Lilly Teaching Fellows Program Fund	LET	Letters & Science Dean's Office	E	View
☐	112543396	Letters and Science Sense of Community Fund	LET	Letters & Science Dean's Office	J	View
☐	112543699	Letters and Science Ideas Fund	LET	Letters & Science Dean's Office	J	View
☐	112546071	Letters & Science, College of Faculty Fellows Fund	LET	Letters & Science Dean's Office	E	View
☐	112546131	Lyons Family Fund	LET	Letters & Science Dean's Office	E	View
☐	112546136	Ciriacks College of Letters and Science Faculty Fellows	LET	Letters & Science Dean's Office	E	View
☐	112546193	Marrett College of Letters and Science Faculty Fellows	LET	Letters & Science Dean's Office	E	View

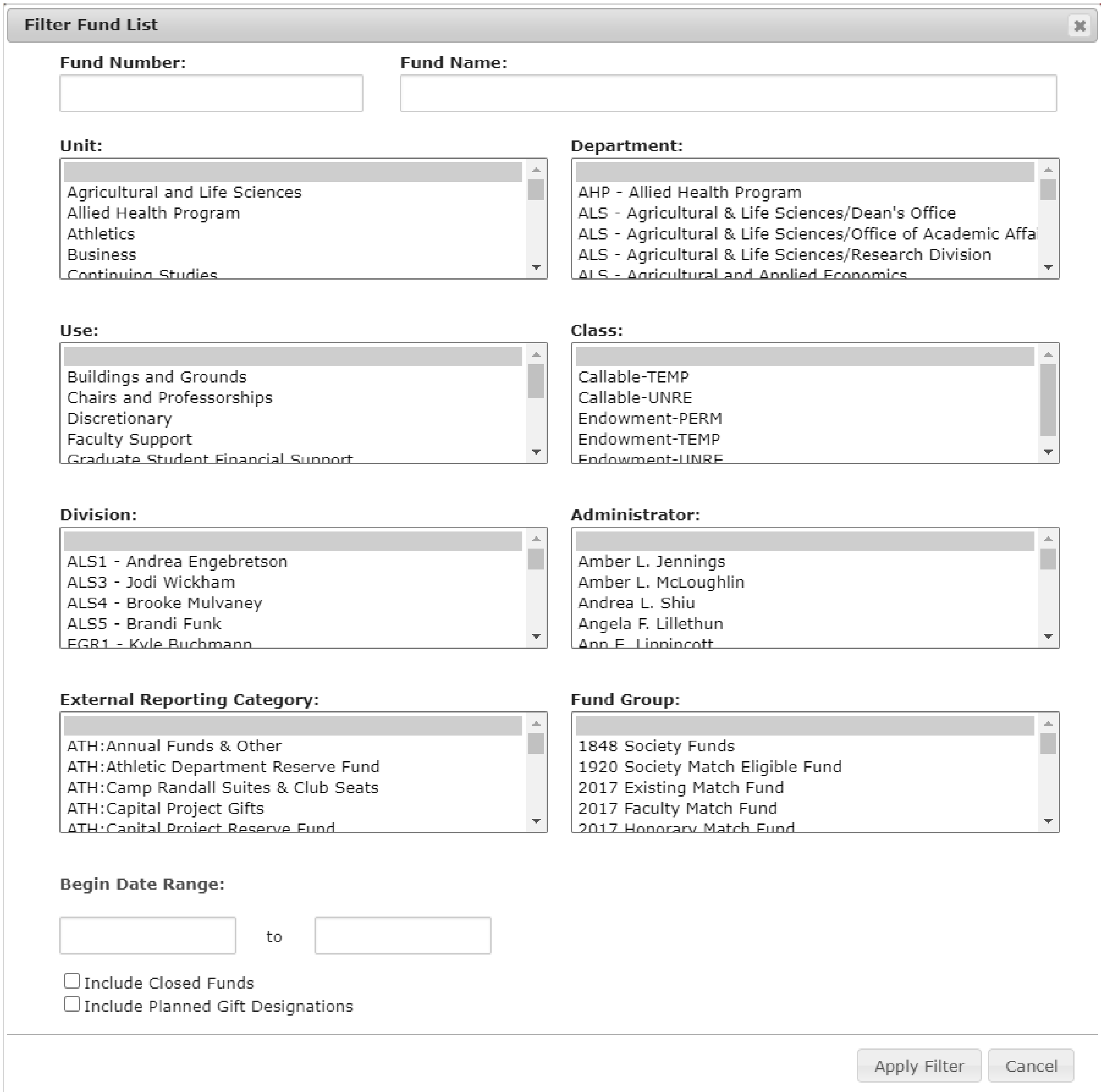
1 2 3 4 5 6 7

Click the column headers to sort the funds by values in that column, and use the buttons at the bottom to scroll through the fund list.

Each fund has a **View** link in the rightmost column. Click the link to see details for a particular fund: financial information, a detailed fund description, a list of users who may access the fund information, etc.

Filtering the Fund List

Depending upon your access permissions, the Fund List & Information page may display a large number of funds over many pages. You have the ability to filter (limit) the funds to display. Begin by clicking the **Filter Fund List** button. A form will display for you to specify fund criteria:



The fields at the top of the page can be used to find funds by number or name.

Use the remaining boxes to select characteristics of the funds you wish to display. To make multiple selections within a box, hold down the *CTRL* key as you select.

The **Begin Date Range** fields are optional. You may use them to limit the list based on the date a fund was created.

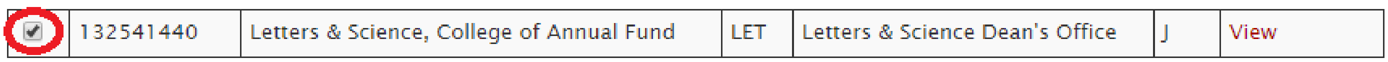
By default, only Open funds are listed. Use the **Include Closed Funds** checkbox to indicate that you wish to list closed funds as well.

Because planned gifts are not included in the Donor Acknowledgement Report, the **Include Planned Gift Designations** checkbox does not apply.

After your selections are complete, click the **Apply Filter** button (or hit the Enter key) to redisplay the Fund List & Information page with funds that match your selections. To remove your filtering choices and redisplay the full list of funds, click the **Refresh Fund List** button found on the Fund List & Information page.

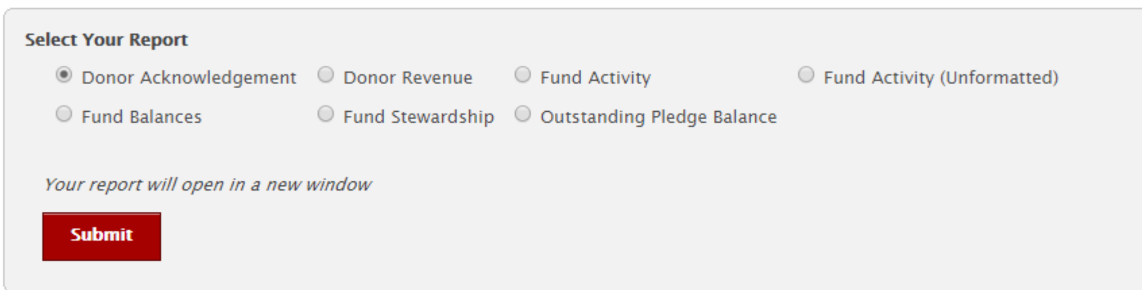
Selecting Funds to Include in the Donor Acknowledgement Report

After using the Fund List & Information page to locate your funds, select one or more funds by checking the checkbox in the first column:



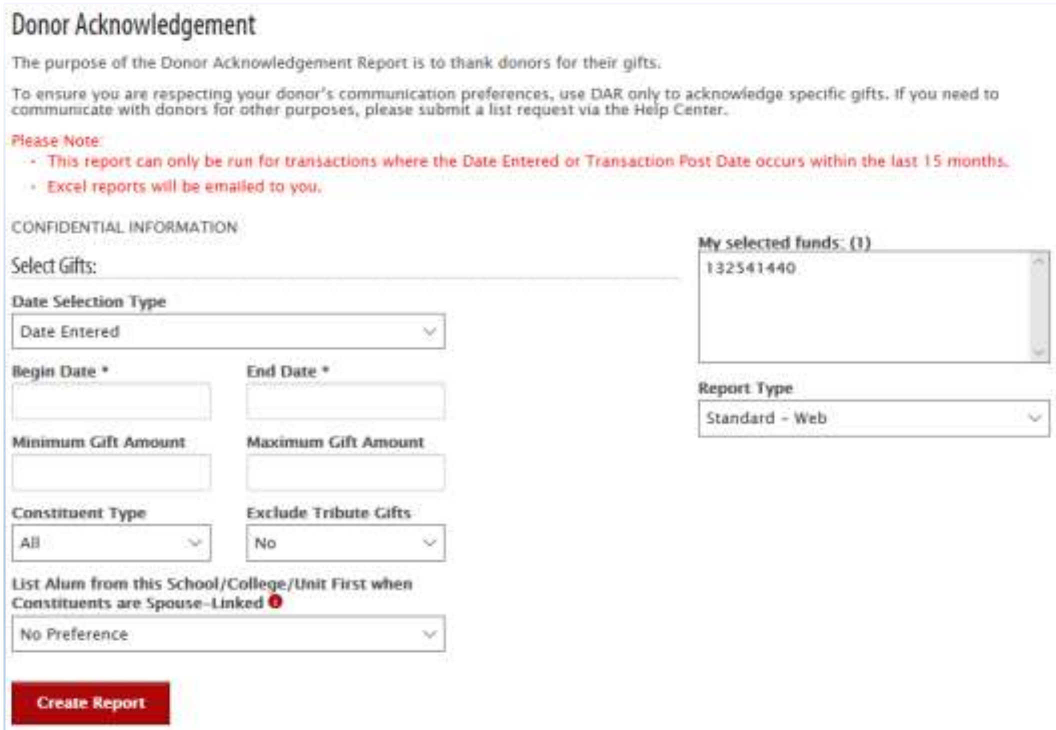
Generating the Donor Acknowledgement Report

After selecting one or more funds to include in the report, use the area below the fund list to select the **Donor Acknowledgement** report, then click the **Submit** button:



Supplying Report Parameters

When the **Submit** button is clicked, a new browser tab appears to collect your report parameters:



Use the parameters to select the fund gifts to include in the report. The first three fields are required.

Date Selection Type

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>. It is the best way to ensure that your report will return all gifts entered for the reporting period, regardless of the transaction date.

Transaction Post Date — Include gifts based upon the date they were received by WFAA. Generally, this aligns with the date a person made their gift online or the date gifts arrive at the lockbox or WFAA offices.

Begin Date
End Date

The date range of gifts to include, following the criteria specified in the **Date Selection Type** field. <u>Dates must be within the last 15 months.</u>

Minimum Gift Amount

Limits the gifts to those having a dollar value equal to or greater than the value entered.

Maximum Gift Amount

Limits the gifts to those having a dollar value equal to or 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

Check this box to <u>not</u> include gifts made in tribute or in memoriam.

List Alum From This School/College/Unit First when Constituents are Spouse-Linked

This selection is only applied to jointly given gifts. By default, the donor who received the revenue credit is the <u>Constituent</u> and their partner is the <u>Spouse</u>. Use this field to indicate your preference to list the alumnus or alumna from your unit listed as the <u>Constituent</u>.

Report Type

There are two report types. The **standard** type contains information most frequently required to thank donors for their gifts. The **expanded** type includes additional donor and gift information which may be useful when organizing your acknowledgements (e.g., by Region) or personalizing a donor message. (A description of standard and expanded data fields is provided later in this document.)

Use **Standard — Web** to view gift data in your browser, including links to ABE CRM (see the next section). You may also request that an Excel version of the report be emailed to you.

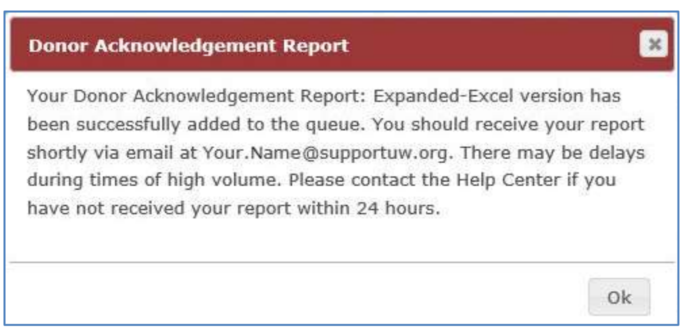
The **Standard — Excel** and **Expanded — Excel** options email an Excel version of the report to you.

Generating the Report

After supplying your report parameters, click the **Create Report** button. Generating the report may take some time depending on the version of the report that you have requested, the begin/end date parameters, and the number of funds you have selected.

<u>**Standard — Excel Reports** and **Extended — Excel Reports**</u>

After you click the **Create Report** button, you will be shown a message confirming the report type and where the report email will be sent:



The email will include a link to download the Excel file. To download, you must be logged in to the Advancement Resources website. (If you are not logged in, you will be prompted to log in. After logging in, the file will immediately download.)

Standard — Web Reports

When a **Standard — Web** report is generated, a list of gifts and their donors is shown:

Gifts

CONFIDENTIAL INFORMATION

Export All Details To Excel

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

Click the column headers to sort the gift/donor entries by values in that column.

The table displays a subset of standard gift and donor information. Use the **Export All Details to Excel** button to generate a report that contains <u>all</u> standard fields and have it mailed to you. (See the previous section.)

Click a gift's **Details** link to display <u>all</u> data related to the gift. The data will display at the bottom of the page:

Transaction Information

Revenue Transaction ID	rev-13744114	Link to gift information
Gift Type Description	Outright Gift	
Amount	$100.00	
Fund Number	132541440	Link to fund information
Fund Name	College of Letters & Science Annual Fund	
Department Name	Letters & Science Dean's Office	
Unit Name	Letters and Science	
Fund Use	Discretionary	
Date Entered	1/3/2017	
Transaction Date	12/29/2016	
Reallocated Gift	No	
Appeal	UWF_2014_Annual Fund	
Payment Channel	Lockbox 236	

Donor Gift History

Gifts To Fund In Last 12 Months (Household)	1
First Gift To Department	Yes
First Gift To Unit	No
First Gift To Fund	Yes

Link to donor information

Donor Information

Constituent ID	Name	Email	UW Degrees
8-100----	C----- Management Associates LLC		

Addressee	C----- Management Associates LLC
Salutation	C----- Management Associates LLC
Address	PO Box 8--- Jackson, WY 8---- United States

(An explanation of the data fields is in the next section.)

The links open a new tab in your browser to display detailed information stored in ABE CRM. The fund information link is inoperable to campus users. Campus users can access fund details via the Advancement Resources website.

Donor Acknowledgement Report — Data Fields

The data fields provided by the Donor Acknowledgement Report are described in the table below.

For **Anonymous** gifts, identifying information will be blank. This is a precaution so you cannot inadvertently include the donor in an acknowledgement communication.

A constituent may have expressed that they wish to limit various types of contact. If so, respective contact information will be blank:

- **Do Not Mail** — Address information is left blank.
- **Do Not Email** — Email information is left blank.
- **Do Not Call** — Phone information is left blank.

Here is an alphabetical list of the report fields. In the rightmost column, an **S** indicates that the field is found in the Standard and Expanded report. An **E** indicates a field that is only found in the Expanded report.

Name	Description	
Acknowledgement Date (mm/dd/yyyy)	Used to submit acknowledgement activity information to WFAA. Supply the date that an acknowledgement was sent for this gift.	S
Acknowledgement Exists	Indicates whether the transaction has corresponding Acknowledgements stored in ABE CRM.	S
Acknowledgement Type	Used to submit acknowledgement activity information to WFAA. It provides a pull-down menu to select the type of acknowledgement sent for this gift.	S
Additional Information	Explains that the donor has provided a specific intent for how the gift is to be used beyond the general funding purpose of the receiving fund.	S
Address1	The donor's address	S
Address2		S
Address3		S
Address4		S
Address5		S
Addressee	The name used in the address of postal correspondence with the constituent.	S
Appeal	Describes the solicitation effort that prompted this gift.	S
Boards/Councils/Committees	The boards, councils, and committees of which the donor is a member. Includes an indicator of current or past membership.	E
City	The donor's city.	S
Constituent First Name	The donor's first name.	S
Constituent ID	A unique ID assigned to the donor.	S
Constituent Last Name	The donor's last name, or the name of an organization.	S
Country	The donor's country.	S
Date Entered	The date the gift record was created in ABE.	S
Degree Major	The donor's major for their primary (initial) degree at UW Madison.	E
Degree Type	The type of degree the donor earned in their primary (initial) degree at UW Madison.	E
Degree Year	The year the donor earned their primary (initial) degree at UW Madison.	E
Department Name	The campus/school department associated with the fund.	S
Development Staff	A list of those who engage in development efforts with the donor, including any Primary Managers, Secondary Managers, Secondary Solicitors, and Interaction Owners.	E
Division	The Development Director who raises money for the Unit and Department associated with the fund. (Not all funds have a Division assignment.)	S
Donor Directed Organization Name	Name of the organization (i.e., Trust or Foundation) that has given the gift on behalf of the donor.	E
Donor Gave to Other Funds within Unit? (Household)	For the reporting period, indicates whether the donor made an outright gift, new pledge, pledge payment, recurring gift initiation, or recurring gift payment to other funds within the same unit/school/college as this gift. (Excludes memberships, event registrations, and anonymous gifts.)	E
Email	The donor's primary email address.	S

Final Pledge Payment	Indicates whether the payment is the final payment on a pledge.	S
First Gift To Department?	Indicates whether the gift is the first time the donor (or either donor in the case of a joint gift) has given to the Department. Does not consider new pledges or recurring gift initiations.	S
First Gift To Fund?	Indicates whether the gift is the first time the donor (or either donor in the case of a joint gift) has given to the Fund. Does not consider new pledges or recurring gift initiations.	S
First Gift To Unit?	Indicates whether the gift is the first time the donor (or either donor in the case of a joint gift) has given to the Unit. Does not consider new pledges or recurring gift initiations.	S
Fund Name	The name of the fund receiving the gift.	S
Fund Number	The number of the fund receiving the gift.	S
Fund Use	The use of the fund receiving the gift (e.g. Discretionary, Endowed Chairs/Professorships, Research, Programs).	S
Gift Capacity Rating (Household)	The estimated gift capacity for the donor's household.	E
Gift Type Description	The type of gift that was received. Possible values are: Outright Gift, New Pledge, Pledge Payment, Recurring Gift Initiation (a commitment from a donor to give regularly with no specific end date), Recurring Gift Payment.	S
Gifts to Fund in Last 12 Months (Household)	The number of gifts to this fund given by members of the household within the last 12 months.	S
Grateful Client? (Vet)	Indicates if the donor is a grateful client of the veterinary school.	E
Has Planned Gift For Site (Household)	Indicates whether the donor's household has a planned gift commitment or payment toward the unit of the gift's fund.	E
Household Total Giving to Dept	Includes all giving to the fund's department, regardless of the report timeframe.	E
Household Total Giving to Unit	Includes all giving to the fund's unit, regardless of the report timeframe.	E
Match Qualification Code	Shows the type of match for which the gift qualifies.	E
Nickname	The donor's nickname, if available.	E
Payment Channel	Indicates the channel through which the payment was received.	S
Payment Notes	Indicates additional information regarding the donor's gift (e.g., attached to a specific research initiative).	E
Phone	The donor's primary phone number.	S
Pledge Balance Amount as of Report Date	The outstanding pledge balance for the day the report was generated (not the selected reporting period).	S
Pledge Type	If gift is a payment against a pledge, indicates the type (e.g., Telefund Pledge, Automatic Deduction, Fixed Term).	S
QPQ Gift?	Indicates that there was a benefit associated with this gift (Quid Pro Quo).	E
Reallocated Gift?	Indicates that the gift has been reallocated. An example is when a gift is initially placed in an undesignated holding fund and later directed by the donor to a specific fund.	S
Recognition Preference	This field only displays in the **web version** of the report, and only when the donor prefers no public recognition.	
Recognition Amount	The amount of recognition credit for the gift. (Usually will equal the Transaction Amount. An example of a different value is for quid pro quo gifts.)	S

Recognition Society Participant?	Lists the names of lifetime recognition societies of which the donor is a member.	E
Region	A geographical area determined by the constituent's county or zip code.	E
Resident/Fellow Alum?	Indicates if the donor is a UW resident or fellow.	E
Revenue Transaction ID	A unique ID assigned to a received payment.	S
Salutation	The name used when addressing the constituent within correspondence.	S
School College	The school or college from which the donor earned their primary (initial) degree at UW–Madison.	E
Spouse Boards/Councils/Committees	The boards, councils, and committees of which the spouse is a member. Includes an indicator of current or past membership.	E
Spouse Degree Major	The spouse's major for their primary (initial) degree at UW–Madison.	E
Spouse Degree Type	The type of degree the spouse earned in their primary (initial) degree at UW–Madison.	E
Spouse Degree Year	The year the spouse earned their primary (initial) degree at UW–Madison	E
Spouse Email	The spouse's primary email address.	S
Spouse First Name	The spouse's first name.	S
Spouse ID	A unique ID assigned to the spouse.	S
Spouse Last Name	The spouse's last name.	S
Spouse School College	The school or college from which the spouse earned their primary (initial) degree at UW–Madison.	E
Spouse UW Degrees	A list of the spouse's UW–Madison degrees.	S
State	The donor's state.	S
Total Pledge	If this is a new pledge or a payment against a pledge, shows the amount of the original pledge initiation.	S
Transaction Amount	The dollar value of the payment made. This may include a portion that is not tax deductible (e.g., value of a dinner for an event ticket purchase).	S
Transaction Date	The date the gift was received by US Bank or WFAA for processing.	S
Tribute	Indicates whether this is a tribute or memorial gift.	S
Tribute Notes	Text describing the tribute if this is a tribute gift.	S
Unit Name	The campus/school unit associated with the fund.	S
UW Degrees	A list of the donor's UW–Madison degrees.	S
Zip	The donor's zip code.	S

Donor Acknowledgement Resources

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

about.uwadvancement.org/development/stewardship-resources

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.

Recording Acknowledgement Activity

Another use of the Donor Acknowledgement Report is 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 and Pledge Acknowledgement Activity in ABE** document in the Stewardship Toolkit.

Acknowledgement letters can be stored in ABE CRM and are tied to a specific revenue transaction. When one of the following acknowledgement types has been stored, a “Yes” will display in the **Acknowledgement Exists** column for the gift:

- General Acknowledgement
- Coach/Celebrity/Spokesperson Acknowledgement
- School/College/Unit Dean Acknowledgement
- Physician/Caregiver Acknowledgement
- DoD Acknowledgement
- Volunteer Acknowledgement
- Student Acknowledgement
- Chancellor Acknowledgement
- First-Time Donor Acknowledgement
- Faculty/Chair/Director Acknowledgement
- WFAA Executive Acknowledgement
- Other School/College/Unit Leadership Acknowledgement

Using Excel to Manage the Donor Acknowledgement Report

The Donor Acknowledgement Report supplies a large amount of data. It can be a daunting task to make sense of the supplied information.

The data can be displayed in your browser, but your view will be limited. The most useful way to work with the data is by using a spreadsheet application like **Excel**. With Excel, you have the capability to **organize** your data and **control how the data is displayed**. The following sections contain common examples of using Excel to make the most of the Donor Acknowledgement Report data.

(Note: The **General Excel Tips** section at the end of this guide is a short primer on basic Excel skills. And don't forget the Internet, where you may find countless articles on how to accomplish both simple and complex Excel tasks.)

Identifying Gifts Having Multiple Donors

In the Donor Acknowledgement Report, each gift is usually represented by a single row of data. Each row describes the donor (and their spouse/partner, if applicable). However, some gifts are represented by multiple rows (e.g., gifts from siblings, gifts from parents and their children). If you wish to easily identify gifts in the latter category, you can use Excel **sorting** and **conditional formatting**.

Sorting

The most straightforward way to identify all donors of a particular gift is to **sort** the data by Revenue Transaction ID. (See the **Links in Report Data** section above and the sorting discussion in the **General Excel Tips** section at the end of this guide.) Once sorted, each gift's entries appear together:

Revenue Transaction ID	Constituent ID	Constituent Last Name	Constituent First Name	Spouse ID	Spouse Last Name	Spouse First Name	Recognition Amount	Donor Directed Organization Name
rev-13267145	8-10449999	Johnson	Don				$400.00	
rev-13290401	8-10332222	Hall	Jim				$1500.00	
rev-13469999	8-10779456	Patterson	Gary	8-1329611	Patterson	Elle	$5,000.00	ABC Company
rev-13469999	8-10326814	Anderson	Mary				$5,000.00	ABC Company
rev-13877777	8-10223344	Williams	Jane				$1,000.00	

As you scan the Revenue Transaction ID column, you will notice three different values. The third value (rev-13469999) appears twice, indicating that these entries define the donors of a single gift.

Conditional Formatting

Unfortunately, it is difficult to look at a column of Revenue Transaction IDs and distinguish one value from another. One way to make things a bit easier is to apply **conditional formatting** to the Revenue Transaction ID column. (See the Highlighting Duplicate Fields discussion in the **General Excel Tips** section at the end of this guide.) In the report example below, conditional formatting has been used to highlight duplicate IDs:

Revenue Transaction ID	Constituent ID	Constituent Last Name	Constituent First Name	Spouse ID	Spouse Last Name	Spouse First Name	Recognition Amount	Donor Directed Organization Name
rev-13267145	8-10449999	Johnson	Don				$400.00	
rev-13290401	8-10332222	Hall	Jim				$1500.00	
rev-13469999	8-10779456	Patterson	Gary	8-1329611	Patterson	Elle	$5,000.00	ABC Company
rev-13469999	8-10326814	Anderson	Mary				$5,000.00	ABC Company
rev-13877777	8-10223344	Williams	Jane				$1,000.00	

Now you can easily know when an entry is part of a group of donor entries.

Applying this kind of conditional formatting to the Revenue Transaction ID column has other advantages. Here is the same conditionally formatted data, now sorted by Constituent Last Name:

Revenue Transaction ID	Constituent ID	Constituent Last Name	Constituent First Name	Spouse ID	Spouse Last Name	Spouse First Name	Recognition Amount	Donor Directed Organization Name
rev-13469999	8-10326814	Anderson	Mary				$5,000.00	ABC Company
rev-13290401	8-10332222	Hall	Jim				$1500.00	
rev-13267145	8-10449999	Johnson	Don				$400.00	
rev-13469999	8-10779456	Patterson	Gary	8-1329611	Patterson	Elle	$5,000.00	ABC Company
rev-13877777	8-10223344	Williams	Jane				$1,000.00	

When looking at this data, you’ve retained the ability to know whether a gift entry has additional donor entries, even when the gifts are sorted in a different order.

Limiting the Display to Gifts That Meet Particular Criteria

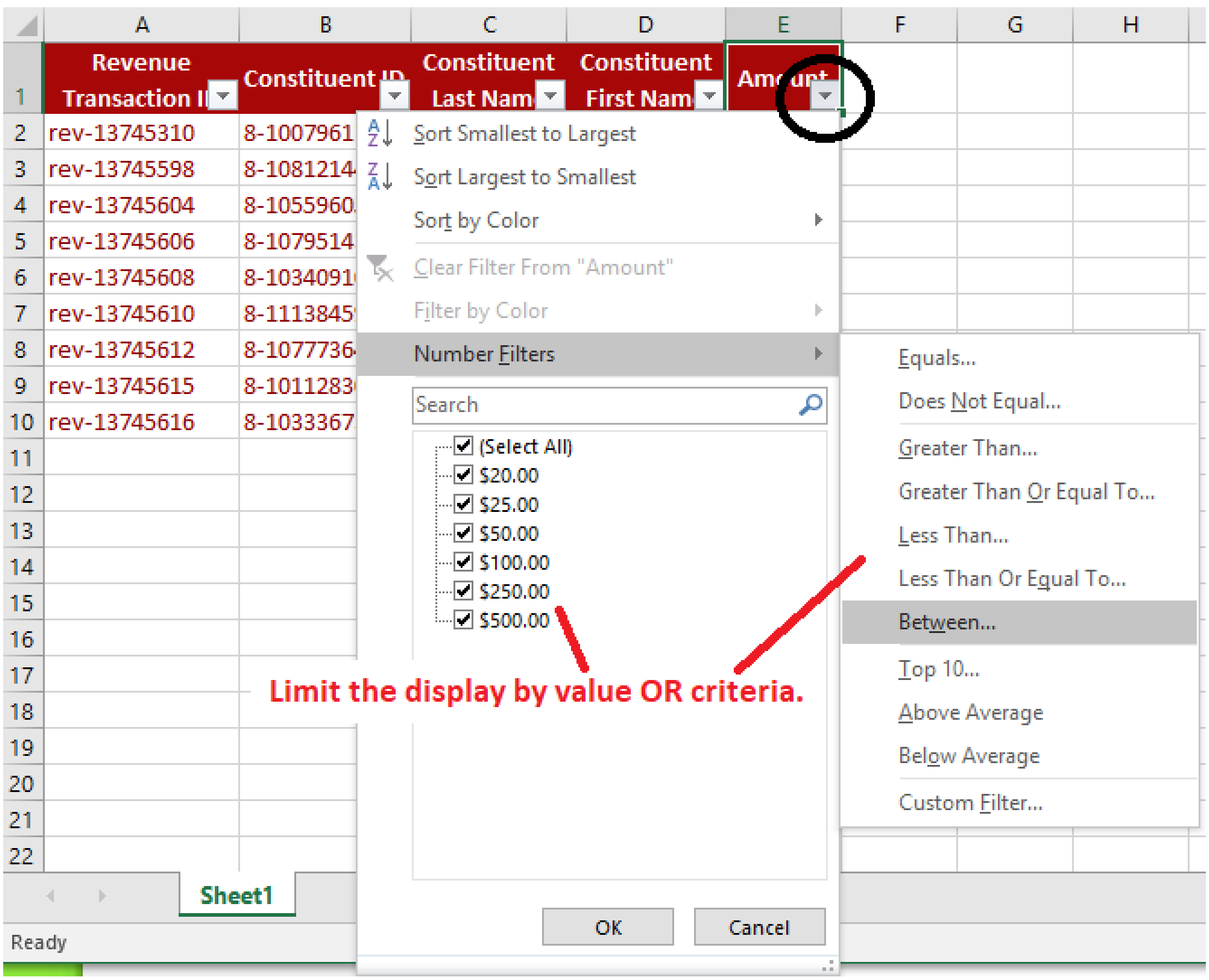
When you generate a Donor Acknowledgement Report, you must select one or more funds and provide a date range of giving. After the report has been generated, you can use Excel to limit the report entries to gifts that meet additional conditions. Perhaps you wish to only see gifts greater than $1,000, or from donors in California, or those that are a donor’s first gift to a particular fund.

Filtering

Use Excel **filtering** to limit the display to data that meets your criteria. (The data that doesn't meet your criteria is hidden, not removed.) When you activate a filter, each column provides a drop-down menu to make your criteria selection. Here is what is displayed when the filter is activated (only a subset of fields is shown in this example):

Revenue Transaction ID	Constituent ID	Constituent Last Name	Constituent First Name	Amount
rev-13745310	8-10079611	Bellow	Norman	$500.00
rev-13745598	8-10812144	Carter	Kent	$50.00
rev-13745604	8-10559605	Kamarski	Paul	$250.00
rev-13745606	8-10795143	Myron	John	$100.00
rev-13745608	8-10340910	Pierson	James	$20.00
rev-13745610	8-11138459	Trawney	Althea	$100.00
rev-13745612	8-10777364	Zimmerman	Floyd	$25.00
rev-13745615	8-10112830	Binners	Judy	$100.00
rev-13745616	8-10333673	Carroll	Louise	$500.00

If you wished to limit the entries based on **amount**, you'd click the arrow in that column. This will provide a means to display amounts corresponding to a particular value or meeting criteria you supply:



Use the checkboxes to select criteria for the entries you wish to display. If only Matching Company is checked, here is the result:

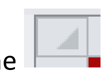
	A	B	C	D	E
1	Revenue Transaction II	Constituent ID	Constituent Last Nam	Constituent First Nam	Amount
2	rev-13745310	8-10079611	Bellow	Norman	$500.00
4	rev-13745604	8-10559605	Kamarski	Paul	$250.00
10	rev-13745616	8-10333673	Carroll	Louise	$500.00
11					

Note that a column that has been filtered displays the  icon in its heading.

Limiting the Columns That Display

The Donor Acknowledgement Report contains more than four dozen columns of data. It may be useful to hide data columns that are not important to the task at hand.

To hide one or more columns, select the columns by clicking the column header (e.g., A, B, C). Once your columns have been selected, place your cursor in a selected area and right-click. A pop-up menu will appear. Select **Hide** to remove the columns from the display.

To unhide (redisplay) the columns, select the columns surrounding the hidden column (or click the  cell in the upper-left-hand corner of your spreadsheet to select all columns). Once selected, place your cursor in the selected area and right-click. Select **Unhide** from the pop-up menu.

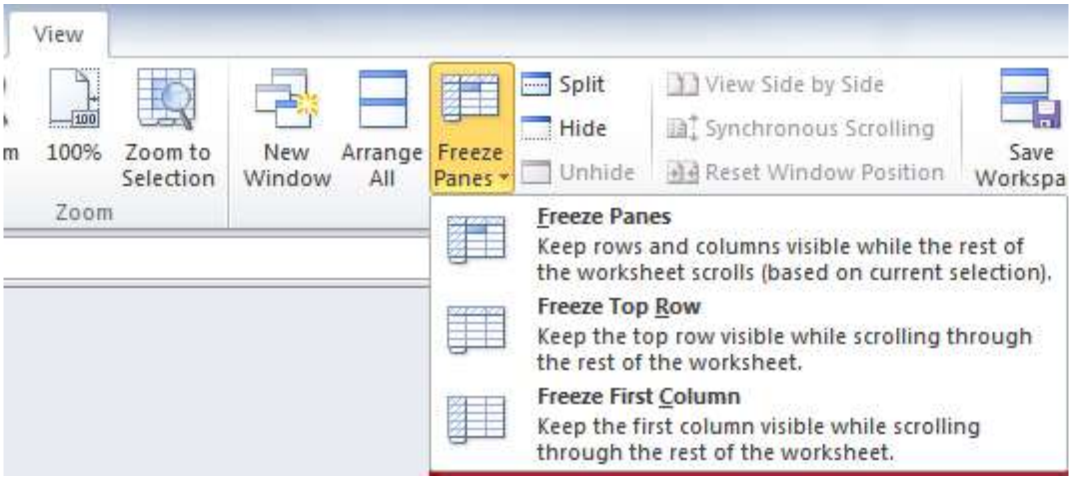
Controlling Which Rows and Columns to Keep in View

Because of the large number of columns (and perhaps rows) in your Donor Acknowledgement Report spreadsheet, it is unlikely that you will be able to keep all data in view. This can make your work difficult. For example, when you scroll down through rows of data, the report headings will scroll off the page. When you scroll through the columns of a donor's record, their name will scroll out of the visible area.

You can address these difficulties through **freeze panes**. A freeze pane allows you to "secure" rows and/or columns in place so that they will stay in view at all times, no matter how you scroll through the worksheet.

Freezing the Header

The most common use of freeze panes is to secure the heading (the top row of the report). To freeze the row, go to the **View** menu, select the **Freeze Panes** button, and then click the **Freeze Top Row** button:



When this is done, your rows of data will scroll but the heading will remain in place.

Freezing the Header and Leftmost Columns

Another common use of freeze panes is to secure the heading and the donor's name. Here is an example of a report spreadsheet (some columns have been hidden — see the previous section **Limiting the Columns That Display**):

	A	C	D	K	W	AA	AI	AJ
1	Revenue Transaction ID	Constituent Last Name	Constituent First Name	Amount	Transaction Date	First Gift To Fund?	Salutation	Address1
2	rev-13745596	Williams	Elaine	$25.00	12/30/2016	No	Ms. Wood	116 S Harmony Dr
3	rev-13745598	Caller	Kent	$50.00	12/30/2016	No	Mr. Calloway & Ms. Calloway	1316 Shirley St
4	rev-13745601	Hall	Bartley	$15.00	12/30/2016	Yes	Mr. Hallinan	N6207 County Road G
5	rev-13745602	Howard	Jamie	$50.00	12/30/2016	No	Ms. Howard	2036 Stephanie Ct
6	rev-13745603	Lawrence	Lisa	$50.00	12/30/2016	No	Ms. Jessup & Mr. Jessup	1301 Chickadee Ln
7	rev-13745604	Perry	Paul	$250.00	12/30/2016	Yes	Mr. Kaczmarski & Ms. Kaczmarski	309 E Ridge St
8	rev-13745605	Schmude	Donald	$50.00	12/30/2016	No	Mr. Koskinen	315 Lake Rd
9								

If the heading (row 1) and the first three columns (A, C, and D) remain in place as the remaining data is scrolled, you will always know what data you are looking at and whom the data is associated with.

To accomplish this, you must first "unfreeze" any rows/columns that have been frozen. Go to the **View** menu, select the **Freeze Panes** button, and then click the **Unfreeze Panes**. (If the Unfreeze Panes option is not presented, no rows/columns have been frozen.)

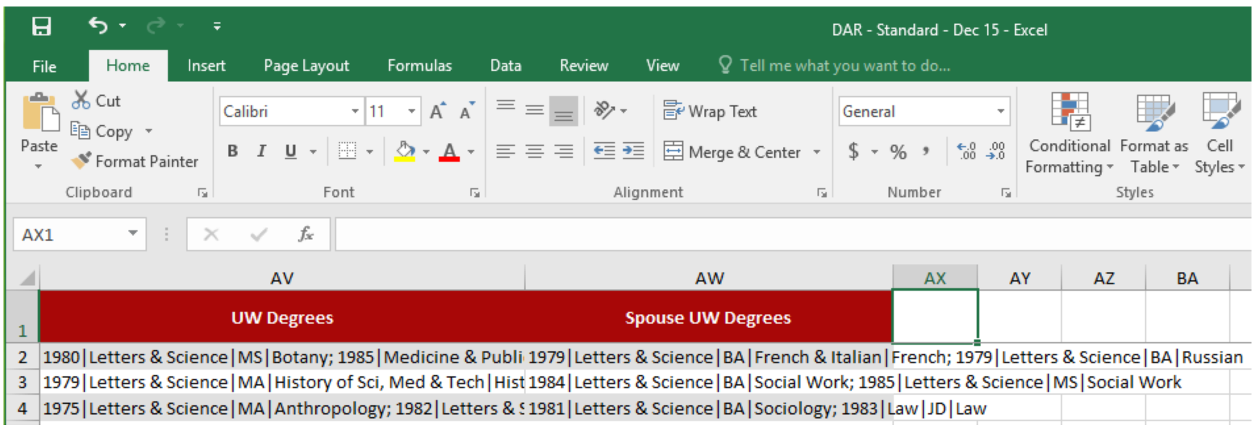
To "freeze" the heading and first three columns, identify the row immediately below the row you wish to freeze (row 2) and the column immediately to the right of the columns you wish to freeze (column K in this example). Click the cell at the intersection of the two:

Revenue Transaction ID	Constituent Last Name	Constituent First Name	Amount	Transaction Date	First Gift To Fund?	Salutation	Address1
rev-13745596	Williams	Elaine	$25.00	12/30/2016	No	Ms. Wood	116 S Harmony Dr
rev-13745598	Caller	Kent	$50.00	12/30/2016	No	Mr. Calloway & Ms. Calloway	1316 Shirley St
rev-13745601	Hall	Bartley	$15.00	12/30/2016	Yes	Mr. Hallinan	N6207 County Road G
rev-13745602	Howard	Jamie	$50.00	12/30/2016	No	Ms. Howard	2036 Stephanie Ct
rev-13745603	Lawrence	Lisa	$50.00	12/30/2016	No	Ms. Jessup & Mr. Jessup	1301 Chickadee Ln
rev-13745604	Perry	Paul	$250.00	12/30/2016	Yes	Mr. Kaczmarski & Ms. Kaczmarski	309 E Ridge St
rev-13745605	Schmude	Donald	$50.00	12/30/2016	No	Mr. Koskinen	315 Lake Rd

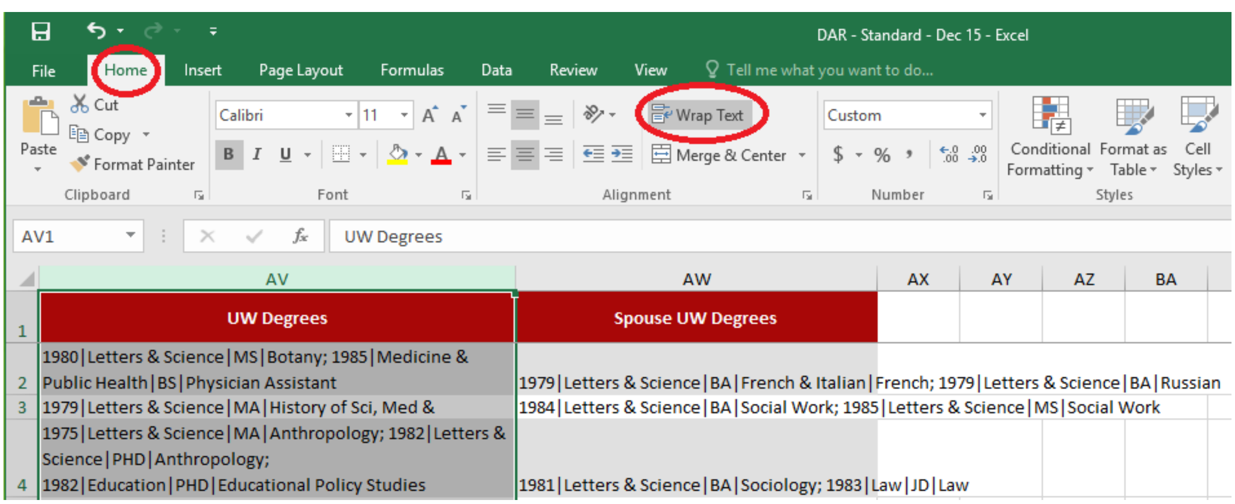
With the cell selected, go to the **View** menu, select the **Freeze Panes** button, and then click the **Freeze Panes** button. You have “secured” the heading and first three columns in place.

Viewing Long Text

When text exceeds a column width, it is possible to automatically wrap the text. For example, the **UW Degrees** column “spills” into the **Spouse UW Degrees** column:



To better view the column contents, select the column (**AV** in our example). On the Home tab, in the Alignment group, click **Wrap Text** (see the circles below). Here is the result:

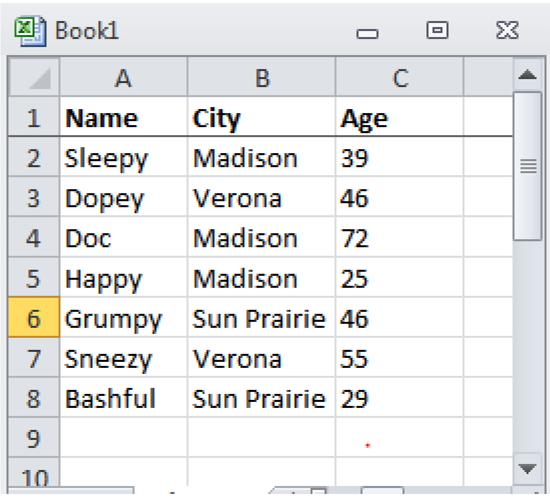


If you change the column width, data **wrapping** adjusts automatically.

General Excel Tips

To make the most of your Donor Acknowledgement data, take advantage of some of Excel's simple but powerful features.

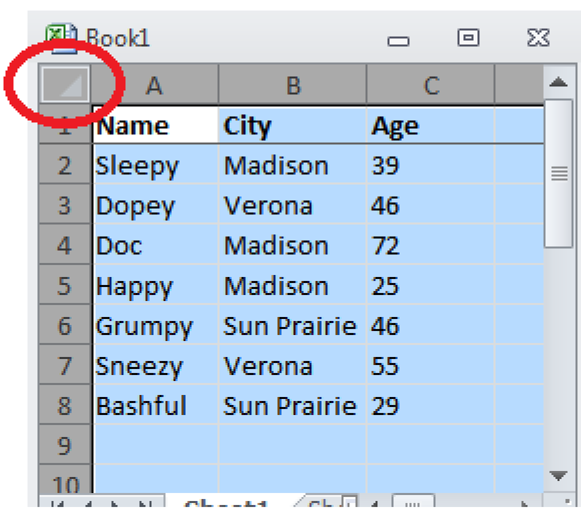
Below are some examples of common features. **Each example will use this data:**



	A	B	C
1	Name	City	Age
2	Sleepy	Madison	39
3	Dopey	Verona	46
4	Doc	Madison	72
5	Happy	Madison	25
6	Grumpy	Sun Prairie	46
7	Sneezy	Verona	55
8	Bashful	Sun Prairie	29
9			
10			

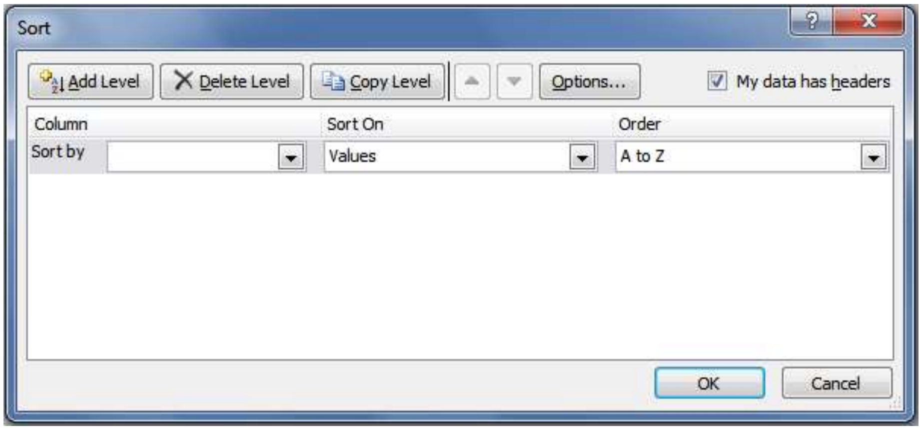
Sorting

To sort the file, click the  icon in the upper right corner to select the entire set of data. All data cells will be shaded.



	A	B	C
1	Name	City	Age
2	Sleepy	Madison	39
3	Dopey	Verona	46
4	Doc	Madison	72
5	Happy	Madison	25
6	Grumpy	Sun Prairie	46
7	Sneezy	Verona	55
8	Bashful	Sun Prairie	29
9			
10			

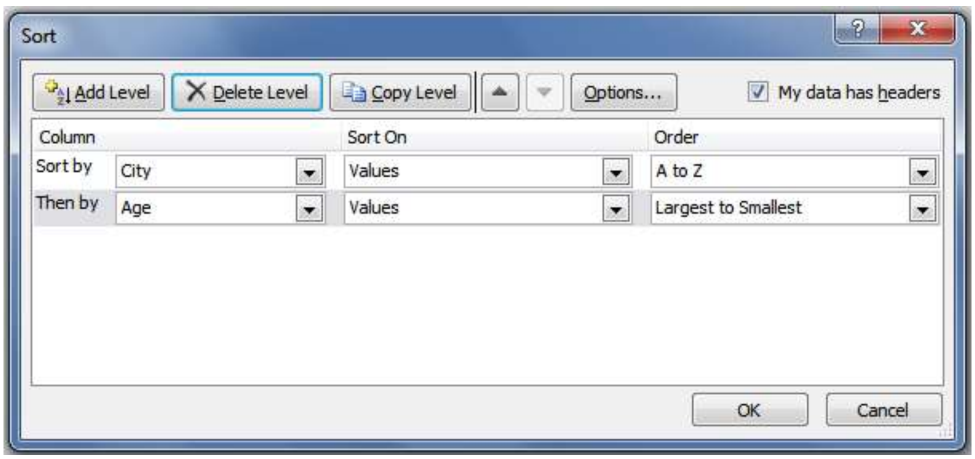
From the menu, select **Data > Sort**. A pop-up will display:



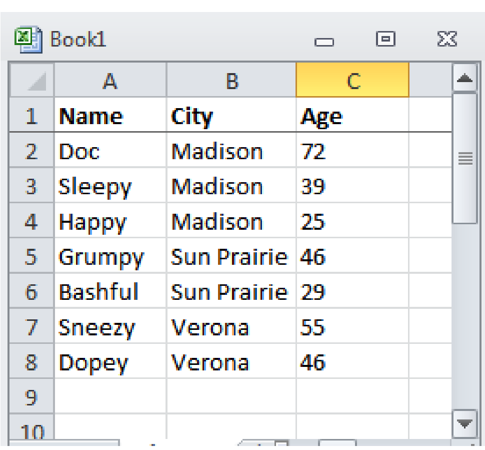
Be sure that the **My data has headers** checkbox (shown at the upper right) is checked.

Click the **Add Level** button to choose the field you wish to sort by. After a field is selected, use the **Order** setting to specify whether you wish to see the data in ascending or descending order.

You may add multiple levels of sorting. Consider these sort settings:



The data will be sorted by city. Then for each city, the data will be sorted by age (oldest to youngest). Click **OK** to sort and redisplay the data:



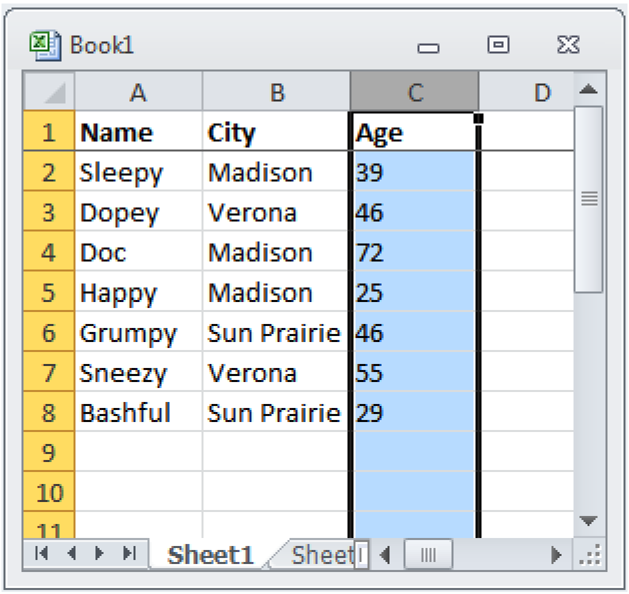
	A	B	C
1	**Name**	**City**	**Age**
2	Doc	Madison	72
3	Sleepy	Madison	39
4	Happy	Madison	25
5	Grumpy	Sun Prairie	46
6	Bashful	Sun Prairie	29
7	Sneezy	Verona	55
8	Dopey	Verona	46
9			
10			

Each city is grouped together, and within each city the records appear in reverse age order.

Highlighting Duplicate Fields

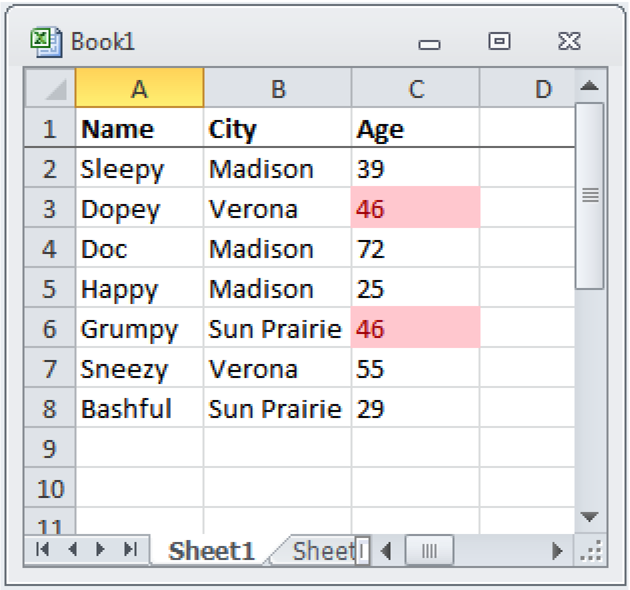
Often it is useful to know if the same value appears more than once in a column of data. Excel can determine this for you with **conditional formatting**.

To start, select the column where you wish to find duplicate values. Do this by clicking the column letter (e.g., A, B, C). The entire column will be shaded:



After the data has been selected, go to the menus and select **Home > Conditional Formatting > Highlight Cells Rules > Duplicate Values…**. A pop-up will appear providing different color schemes to highlight the duplicate values.

Here is the data when the default scheme is selected:



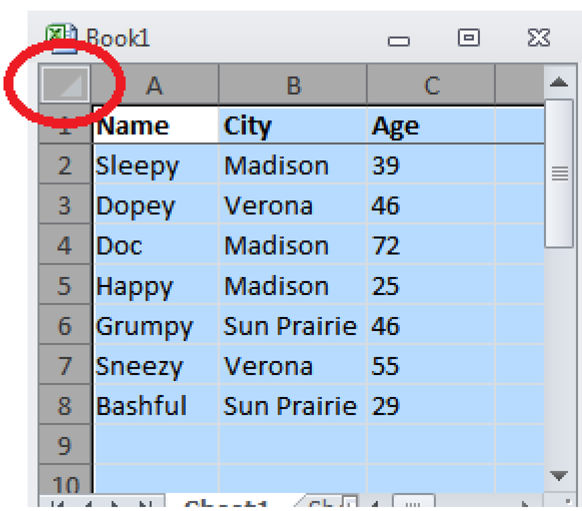
	A	B	C	D
1	Name	City	Age	
2	Sleepy	Madison	39	
3	Dopey	Verona	46	
4	Doc	Madison	72	
5	Happy	Madison	25	
6	Grumpy	Sun Prairie	46	
7	Sneezy	Verona	55	
8	Bashful	Sun Prairie	29	
9				
10				

Here you can see that the value **46** appears more than once in the Age column.

Removing Duplicate Rows

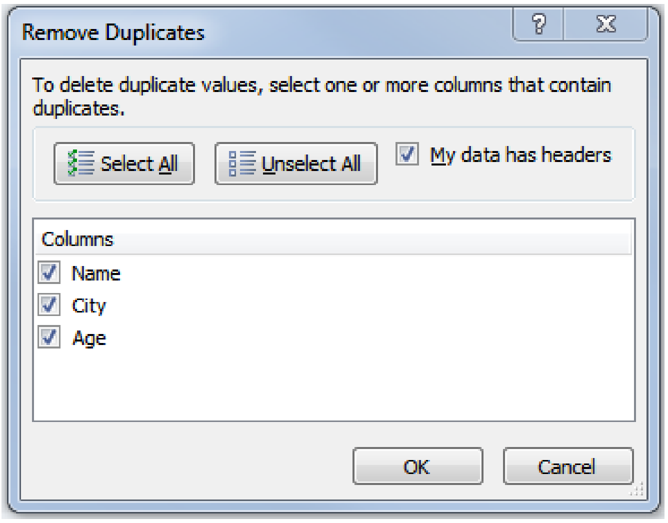
You can use Excel to remove “duplicate” rows. Duplicate rows are those that have matching data in one or more columns. It’s up to you to specify which columns should be used. For example, let’s say we wish to determine which cities are represented in our data.

The easiest way to start the process is to click the  icon in the upper right corner to select the entire set of data. All data cells will be shaded.

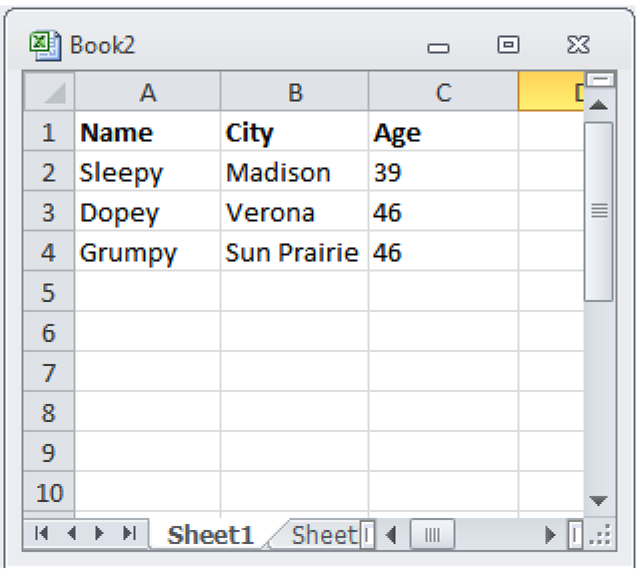


	A	B	C
1	Name	City	Age
2	Sleepy	Madison	39
3	Dopey	Verona	46
4	Doc	Madison	72
5	Happy	Madison	25
6	Grumpy	Sun Prairie	46
7	Sneezy	Verona	55
8	Bashful	Sun Prairie	29
9			
10			

From the menu, select **Data > Remove Duplicates**. A pop-up will display:



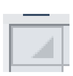
Use the pop-up to define which data to use when determining duplicate rows. For our example, we will uncheck everything except **City**. Once this is done, clicking the **OK** button causes Excel to remove the duplicates:



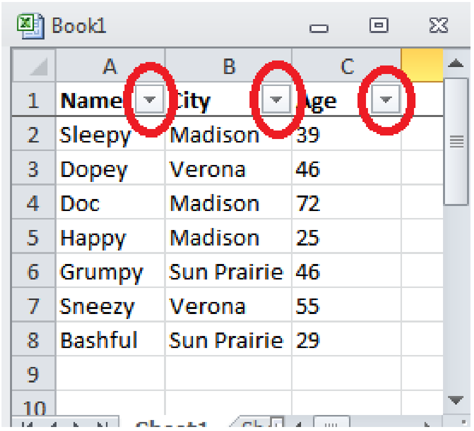
The result is a file where the City values appear only once, so we've determined that our file has three unique cities.

Filtering

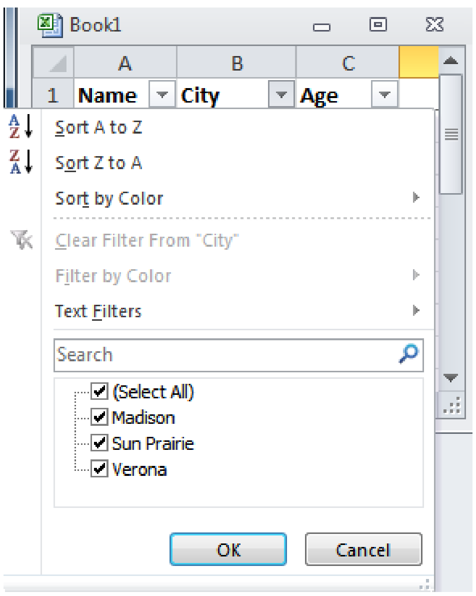
When you filter data, you limit the display to data that meets your criteria. (The data that doesn't meet your criteria is hidden, not removed.) In our data example, let's say we wish to only display Verona records.

To start, click the  icon in the upper right corner to select the entire set of data. All data cells will be shaded. (As an alternative, you could select just the city column, because your goal is to filter by just that column's data.)

After the data has been selected, go to the menus and select **Data > Filter**. Each selected data column will have a  icon added to its heading:



When you click one of these arrow icons, a list of data values found in the column is shown. Here's the display when the **City** column filter is clicked:

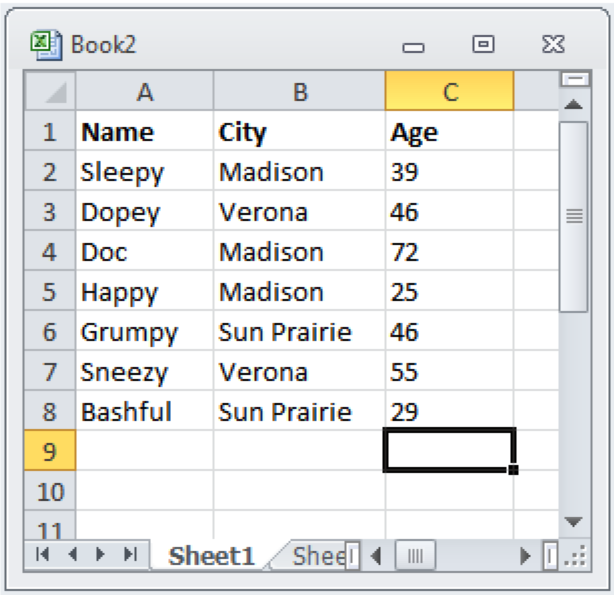


Use the checkboxes to select which records to display. After your selections are made, click the **OK** button. A column that has been filtered will display the  icon in its heading.

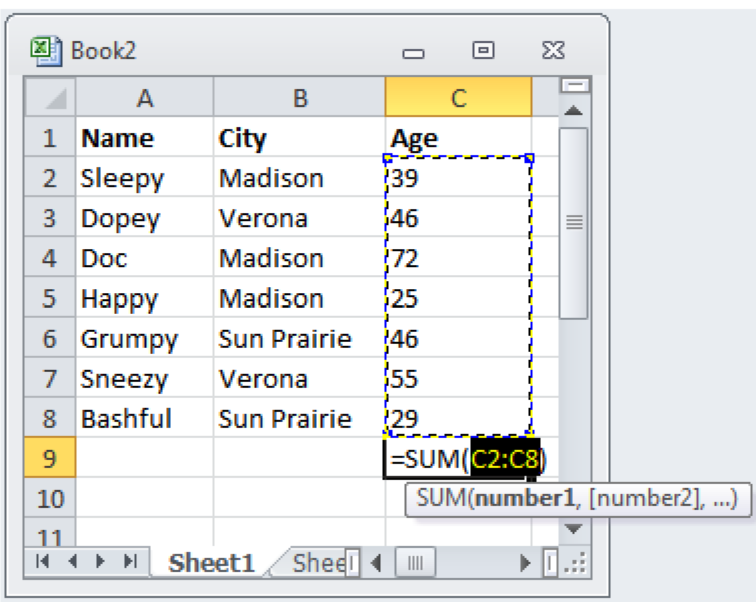
Sum of a Column’s Values

To tally the total value of data in a column. Excel provides a **sum function**.

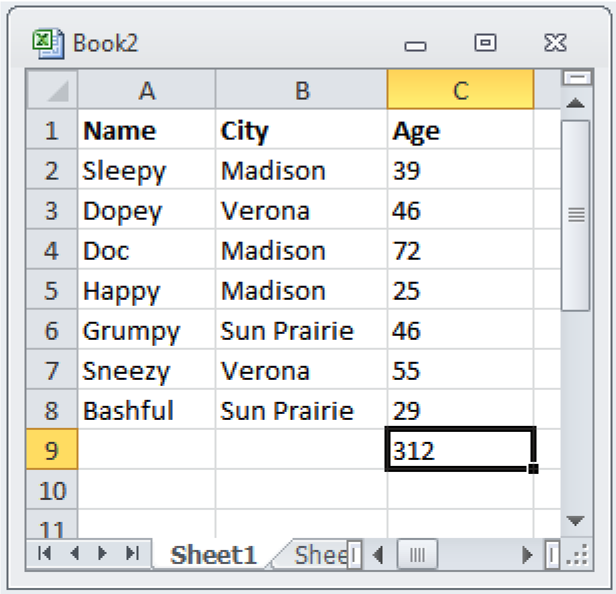
To start, select a cell below the column of values you wish to add. To add all Age values:



After the cell has been selected, go to the menus and select **Formulas > AutoSum > Sum**. Excel will place a sum formula in the cell:



Hit the Enter key to display the sum in the selected cell:


Book2

	A	B	C
1	**Name**	**City**	**Age**
2	Sleepy	Madison	39
3	Dopey	Verona	46
4	Doc	Madison	72
5	Happy	Madison	25
6	Grumpy	Sun Prairie	46
7	Sneezy	Verona	55
8	Bashful	Sun Prairie	29
9			312
10			
11			

Sheet1 Shee