Matching, Batching, and Dispatching

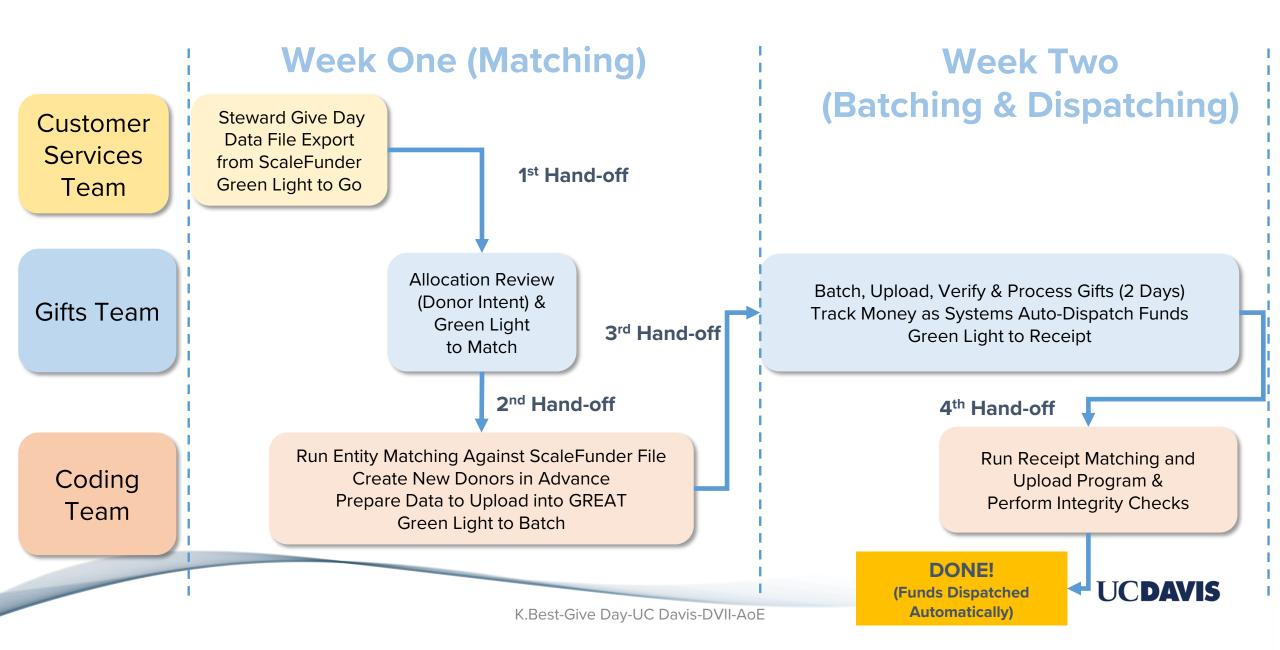
Give Day at UC Davis



Advancement Services Give Day Play Map (2019) - UC Davis

GIVE DAY Feb Mar Jan Apr Apr May Jun-Dec Customer Request Triage War Room & Host Create Appeal & Review Solicitation Data & Allocation Services Compile Final Lessons Play Book Campaign Coordinate Challenge Gifts Review ScaleFunder Data Learned Team Codes Create **Apply** Attend Solicitation Appeal & Pull Refine Deliver Appeal & Lessons Data Team Campaign Data Data Data Campaign Learned Codes Codes Attend **Set Business** Load & Gifts Team **Process** Lessons Rules for Learned Gifts CyberSource Build & Test Mass Receipt Uploader Attend Coding Run all Configure Configure & Test Entity Matching Program Lessons CyberSource **Programs** Team Refine & Test Contact Data Loader Program Learned

Give Day Gift Processing Timeline & Work Flow





https://giveday.ucdavis.edu/

Planned Giving Challenge -Wayne & Jacque Bartholomew



THANK YOU to our generous donors for helping us reach our goal of 75 planned giving requests! Your support for the Reggle Low Endowment In Cardiology and Mondavi Center Annual

00.000 Program Fund Is Important and very

The Sullivan Family Challenge for the Davis Chancellor's Club



\$25,000

THANK YOU to our generous donors for helping us reach our goal of 125 gifts! Your support for the Annual Fund and Davis Chancellor's Club is important and very much appreciated. Thank you to the Sullivan Family for providing this \$25,000 challenge gift!

₩ 125 / 125 GIFTS

COMPLETED

Davis Chancellor's Club Cabinet Challenge



\$16,000

THANK YOU to our generous donors for helping us reach our goal of 50 gifts! Your support for the UC Davis Annual Fund is important and very much appreciated. Thank you to the DCC Cabinet for providing this \$16,000 challenge gift!

₩ 50 / 50 GIFTS

COMPLETED

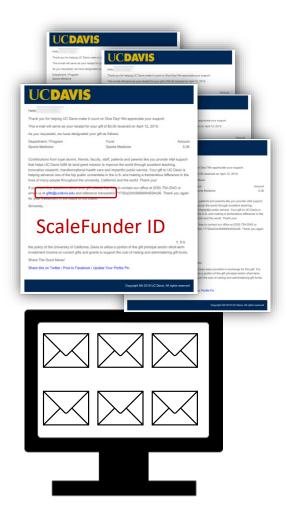
Thank you to Wayne omew for providing ange gift!

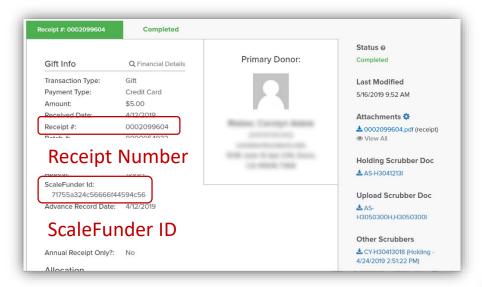
COMPLETED

Challenge gifts



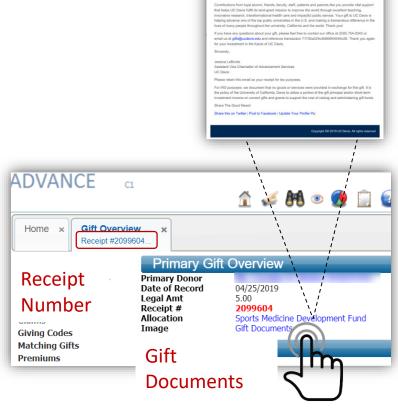
Receipt Converter and Uploader Application





Procedure for Each Email Receipt

- 1. Read email in dedicated receipt inbox
- 2. Find ScaleFunder ID in email
- 3. Find gift in GREAT ecosystem using ScaleFunder ID
- 4. Extract the receipt number from gift record
- 5. Convert email receipt to PDF
- 6. Save as PDF with receipt number as file name
- 7. Upload PDF to gift record in GREAT
- 8. Additional access in Advance via Gift Documents





Multi-Purpose Contact Data Uploader Application

