

Beyond Word-merge

Creating a custom gift receipt process

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Virginia Commonwealth University

About VCU

BBCRM Stats

- Went live in 2015
- 1 year conversion, from a 30 year old system
- Slow process for end user adoption of CRM
- Best-practice implementation

VCU Stats

- 31,000 students
- 190,000 living alumni
- 5 associated Foundations
- Approaching the end of our “Make it Real” campaign

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Overview

Receipting history

Pre-CRM

- Complex custom Crystal Report with constant updates over 6 years
- Was not feasible to replicate in CRM using out-of-box functionality

CRM Go-Live

- Basic receipting by foundation using CRM Word Merge
- Campaign branding and content on all receipts, regardless of designation
- Lots of manual review for special exceptions
- Word merge would not account for hierarchy of gift splits and other intricacies

Goals of project

- Maintain an IRS compliant gift receipt
- Allow for Schools and Units to create custom content and branding
- Allow for some units to be exempt from campaign branding
- Keep CRM receipt number and receipt info on revenue record
- Provide proofing queues for our stewardship office to facilitate review
- Ensure offline and online receipts stayed in sync
- Keep everything on 1 page

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Content Management

Content Management

- Give stewardship office ability to manage content using limited merge fields
- Editable content regions
- Future compatibility with tribute gifts
- Create versioning of receipts as needed

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Evaluate content areas of receipt

A



B

May 29, 2018
Ms. Jane Q. Doe
123 Main Street
Richmond, VA 23235

Dear Ms. Doe,

C

Thank you for your dedication to the future of Virginia Commonwealth University with your recent gift to the VCUarts Annual Fund.

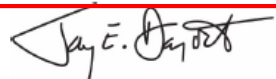
Your generosity is especially meaningful as it is part of the Make It Real Campaign for VCU, the largest fundraising campaign in the history of the university, seeking to raise \$750 million across all of VCU. Your support during this time ensures that our students, faculty, researchers and clinicians have the resources necessary to achieve their academic and professional goals and to shape a brighter and better future.

Our gratitude extends beyond your gift made today, knowing that the dedication of our alumni and friends of the university will leave a lasting mark for generations to come.


Thank you, again, for your confidence in VCU.

Kindest regards,

D


Jay E. Davenport, CFRE
Vice President
Development and Alumni Relations

E


			
Donor:	Ms. Jane Q. Doe	Donor ID:	8-10361700
Date:	11/28/2017	Receipt No.	57858
Unit:	School of the Arts		
Designation:	VCUarts Annual Fund		
Gift:	\$150.00		

To comply with IRS requirements, this letter verifies that you have not received any substantial benefits in exchange for your gift. Please keep this letter for your tax records. If you have any questions, please contact the Office of Gifts & Records Management. (804) 828-0632 or email giving@vcu.edu.

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List Builder to show different receipt versions





 **Receipt Management**

Receipt Management

Receipt Preview

Training Tip
Please run the [Online Receipt Update Process](#) when updates are made to any of the receipts below.

Receipt Management (18)  Add  More ▾

 Columns ▾  Save list  Open list  Clear all filters

Receipt title	Report code 1 ▲	Report code 2	Is active	Date changed
Default			Yes	11/29/2017
College of Humanities & Sciences	College of Humanities & Sciences		Yes	11/29/2017
Honors College	Honors College		Yes	11/29/2017
Institute for Contemporary Art	Institute for Contemporary Art		Yes	2/20/2018
Wilder School	L. Douglas Wilder School of Gover...		Yes	3/16/2018
College of Health Professions	School of Allied Health Professions		Yes	5/8/2018
School of Business	School of Business		Yes	11/29/2017
School of Education	School of Education		Yes	11/29/2017
College of Engineering	School of Engineering		Yes	5/1/2018
School of Medicine	School of Medicine		Yes	11/29/2017
School of Nursing	School of Nursing		Yes	11/29/2017
School of Pharmacy	School of Pharmacy		Yes	11/29/2017
School of Social Work	School of Social Work		Yes	11/29/2017
VCU Alumni	VCU Alumni		Yes	3/21/2018
VCU Athletics	VCU Athletics		Yes	3/7/2018
VCU Libraries	VCU Libraries		Yes	11/29/2017
VCU Life Sciences	VCU Life Sciences		Yes	3/16/2018
VCU Massey Cancer Center	VCU Massey Cancer Center		Yes	12/15/2017

HTML editor for content edits

✕

Edit receipt management

Receipt title:

School of Business

Report Code 1:

School of Business

Report Code 2:

Header image ID:



BusinessHeader

Signatory image ID:

Business_Grier

☒ Is active

Standard text content:




Font Family


Font Size


B


I


U


 ab




















HTML

Thank you for your dedication to the future of the VCU School of Business with your recent gift~!FUNDINFO!~.

Your generosity contributes to our strategic plan, EPIC. Each letter represents a strategic pillar: Experiential learning, Problem-solving curricula, Impactful research and Creative culture. Your gift, as part of the Make It Real Campaign for VCU, helps build on our strengths to ensure that every student is prepared to thrive in a changing world. It further ignites the collaborative energy among students, faculty and professionals, driving the future of business in Richmond and beyond. We are grateful for your interest and support.

On behalf of all of us at the School of Business, many, many thanks for all you have done and continue to do for VCU!

Implementation of the HTML editor in UI Model

```
_standardTextContent = new HtmlField
{
    Name = "STANDARDTEXTCONTENT",
    Caption = "Standard text content"
};
this.Fields.Add(_standardTextContent);
```



```
<tr id="#MAP#STANDARDTEXTCONTENT_container">
  <td colspan="2">
    <table>
      <tr>
        <td> <label id="#MAP#STANDARDTEXTCONTENT_caption" for="#MAP#STANDARDTEXTCONTENT_value"></label> </td>
      </tr>
      <tr>
        <td style="padding-left:10px;">
          <div id="#MAP#STANDARDTEXTCONTENT_value" style="height:300px;width:630px;" class="bbui-forms-anchor-right bbui-forms-anchor-bottom"></div>
        </td>
      </tr>
    </table>
  </td>
</tr>
```

Preview

Receipt Management Receipt Preview

PROCESSID ☒ NULL RECEIPTNUMBER ☐ NULL

1 of 1 Find Next



January 25, 2017

Mr. and Mrs. John Q. Smith
123 Main Street
Richmond, VA 23235

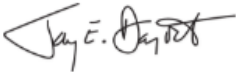

Dear Mr. and Mrs. Smith,

Thank you for your dedication to the future of the Life Sciences at Virginia Commonwealth University with your recent gift.

Your generosity allows students, faculty and researchers to continue to benefit from the cross-disciplinary and cutting-edge programs at the Center for Environmental Studies and the Center for the Study of Biological Complexity. Your contribution also comes at a critical time for the VCU Rice Rivers Center, as we are in the final stages of our capital campaign for our research building, thereby completing our development plan for VCU's river campus.

The investment you have made in Life Sciences will continue to yield benefits for generations to come.

Kindest regards,



Robert M. Tombes, Ph.D.
Vice Provost for Life Sciences and Research

Jay E. Davenport, CFRE
Vice President
Development and Alumni Relations



Receipt Report

SSRS Report

- Goal: to automate a *majority* of receipts, not possible to do all
- Lots of formatting challenges with export to word and PDF (spacing and font sizing)
- Stewardship office still needs to make manual edits to some receipts
- With lots of dynamic formatting and content, did most of the calculations in SQL

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Dynamic content



Donor: Mr. and Mrs. John Q. Smith
Date: 3/27/2018
Unit: School of Business
Designation: School of Business Annual Fund
Gift: \$125.00

Donor ID: 8-10807079
Receipt No.: 65018

To comply with IRS requirements, this letter verifies that you have not received any substantial benefits in exchange for your gift. Please keep this letter for your tax records. If you have any questions, please contact the Office of Gifts & Records Management. (804) 828-0632 or email giving@vcu.edu.

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Gifts

Partial Gifts



Donor: Mr. John Q. Smith RN
Date: 2/27/2018
Unit: VCU Health System
Designation: Trauma Gala Fund
Gift: \$150.00
Goods & Services: \$100.00
Deductible: \$50.00

Donor ID: 8-10807091
Receipt No.: 65003

To comply with IRS requirements, this letter verifies that your payment is partially goods and services and is not completely tax-deductible. Please keep this letter for your tax records. If you have any questions, please contact the Office of Gifts & Records Management. (804) 828-0632 or email giving@vcu.edu.

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Dynamic content

MCV Foundation



Donor: Mr. and Mrs. John Q. Smith II
Date: 12/31/2017
Unit: VCU Massey Cancer Center
Designation: Massey Cancer Center
Gift: \$100.00

Donor ID: 8-10285554
Receipt No.: 61680

In honor of Jane Doe, 1982, In honor of Bill Jones

To comply with IRS requirements, this letter verifies that you have not received any substantial benefits in exchange for your gift. Please keep this letter for your tax records. If you have any questions, please contact the Office of Gifts & Records Management. (804) 828-0632 or email giving@vcu.edu.



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Tributes

Anonymous gifts

MCV Foundation



Donor: Dr. and Mrs. John Q. Smith
Per your request, your gift will remain anonymous.
Date: 1/31/2018
Unit: School of Medicine
Designation: Medicine Annual Fund
Gift: \$2,000.00

Donor ID: 8-10308537
Receipt No.: 62889

To comply with IRS requirements, this letter verifies that you have not received any substantial benefits in exchange for your gift. Please keep this letter for your tax records. If you have any questions, please contact the Office of Gifts & Records Management. (804) 828-0632 or email giving@vcu.edu.

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Dynamic content



VCU School of Business
Foundation

Donor: Mr. and Mrs. John Q. Smith, Jr.
Date: 12/31/2017
Unit: School of Business
Designation: School of Business Annual Fund
Gift: \$5,000.00
Unit: School of Business
Designation: EPIC Fund
Gift: \$1,000.00
Total: \$6,000.00

Donor ID: 8-10359231
Receipt No.: 60996

To comply with IRS requirements, this letter verifies that you have not received any substantial benefits in exchange for your gift. Please keep this letter for your tax records. If you have any questions, please contact the Office of Gifts & Records Management. (804) 828-0632 or email giving@vcu.edu.

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Split gifts

MCV Foundation
 **VCU**Health.



VCU VCU Foundation

Donor: Dr. and Mrs. John Q. Smith
Date: 12/31/2017
Unit: School of Medicine
Designation: Department of Internal Medicine
Gift: \$500.00
Unit: School of Medicine
Designation: Pauley Heart Center Campaign Fund
Gift: \$500.00
Total: \$1,000.00

Donor ID: 8-10296712
Receipt No.: 61817

To comply with IRS requirements, this letter verifies that you have not received any substantial benefits in exchange for your gift. Please keep this letter for your tax records. If you have any questions, please contact the Office of Gifts & Records Management. (804) 828-0632 or email giving@vcu.edu.

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Hiding unused sections

Expression

Set expression for: Hidden

=Fields!STOCKDATA1.Value is nothing

Donor:	[ADDRESSEE]	Donor ID:	[RADARID]
	[ANONYMOUSTEXT]	Receipt No.:	[RECEIPTNUMBER]
Date:	[REVDATE]	Receipt No.:	[RECEIPTNUMBER]
Unit:	[DIVISION1]		
Designation:	[DESIGPUBLICNAME1]		
«Expr»	«Expr»		
«Expr»	[STOCKDATA1]		
	«Expr»		
Unit:	[DIVISION2]		
Designation:	[DESIGPUBLICNAME2]		
«Expr»	«Expr»		
«Expr»	[STOCKDATA2]		
	«Expr»		
Total:	[TRANSACTIONAMOUNT]		
Goods & Services:	[BENEFITTOTALVALUE]		
Deductible:	[RECEIPTAMOUNT]		
	[TRIBUTETEXT]		



Expression

Set expression for: Hidden

=Fields!BENEFITTOTALVALUE.Value is nothing or Fields!DIVISION1.Value = "VCU Athletics" or Fields!DIVISION2.Value = "VCU Athletics"

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Bottom align the footer section

[SIGNATORYTEXT]		[VPSIGNATURETEXT]	
<div> <div></div> <div></div> </div>			
			
Donor:	[ADDRESSEE] [ANONYMOUSTEXT]	Donor ID:	[RADARID]
Date:	[REVDATE]	Receipt No.:	[RECEIPTNUMBER]
Unit:	[DIVISION1]	Receipt No.:	[RECEIPTNUMBER]
Designation:	[DESIGPUBLICNAME1]		
«Expr»	«Expr»		
«Expr»	[STOCKDATA1]		
	«Expr»		
Unit:	[DIVISION2]		
Designation:	[DESIGPUBLICNAME2]		
«Expr»	«Expr»		
«Expr»	[STOCKDATA2]		
	«Expr»		
Total:	[TRANSACTIONAMOUNT]		


Expression

Set expression for: Hidden

=NOT(Fields!DIVISION2.Value) is nothing or Fields!DIVISION1.Value = "VCU Athletics"
or Fields!DIVISION2.Value = "VCU Athletics"

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To accommodate long tax wording

	VCU VCU Foundation	
Donor:	Mr. and Mrs. J. Q. Smith <i>Per your request, your gift will remain anonymous.</i>	Donor ID: 8-10293074
Date:	4/24/2017	Receipt No.: 47934
Unit:	VCU Athletics	
Designation:	VCU Ram Athletic Fund	
Amount:	\$7,500.00	
<p><i>The Tax Cut and Jobs Act of 2017 amended Section 170(l) of the Internal Revenue Code to state that no deduction shall be allowed for an amount paid to an institution of higher education when "the taxpayer receives (directly or indirectly) as a result of paying such amount the right to purchase tickets for seating at an athletic event in an athletic stadium of such institution." As this is a newly passed bill, if you have any questions as to the deductibility of this transaction, please consult your tax advisor. If you do not purchase tickets, the entire gift may be tax-deductible and you will receive an end of year tax letter. If you have any questions, please contact the Office of Gifts & Records Management, (804) 828-0632 or email giving@vcu.edu.</i></p>		
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Implementation

Receipt processes

- Athletics transactions/ gifts
- 3 or more splits
- Tribute gifts
- Gifts with membership payments
- Gifts that were previously receipted
- “Oddities”
- Normal gifts



Add the report to the receipt process page


✓	Receipts - 3 or More Splits	Completed	5/23/2018 6:07:20 AM	21 seconds	0	5/23/2018
✓	Receipts - Athletics	Completed	5/23/2018 6:07:00 AM	20 seconds	18	5/23/2018
✓	Receipts - Normal Gifts	Completed	5/22/2018 6:10:21 AM	25 seconds	86	5/22/2018
<div>Download output Merge Mark receipted Mark for re-receipt Unmark for re-receipt Clear results Receipt preview</div>						
✓	Receipts - Oddities	Completed	5/22/2018 6:09:03 AM	1 minute 17 seconds	7	5/22/2018
✓	Receipts - Previously Receipted	Completed	5/22/2018 6:08:34 AM	29 seconds	0	5/22/2018
✓	Receipts - Gifts With Members...	Completed	5/22/2018 6:08:10 AM	23 seconds	0	5/22/2018
✓	Receipts - Tribute Gifts	Completed	5/22/2018 6:07:45 AM	24 seconds	15	5/22/2018


AlterPage on Receipt process list

```
<AlterExistingPages>
  <AlterPages>
    <AlterPage PageID="4ddfbd9f-e264-4065-919f-71bd12a71a80">
      <AlterTabs>
        <AlterTab TabID="f823f3cf-db19-446b-a4f3-4b7545de8de9">
          <AlterSections>
            <AlterDataListSection DataListID="c89a38c9-60b1-4aac-93e1-00c80fde166e" SectionID="3e316c38-6f5a-461c-861a-2ad0bcd9d001">
              <AlterActions>
                <AddAction Sequence="100">
                  <Action ID="c1586d65-71eb-435d-8e6d-91322857c2d6" Caption="Receipt preview" ImageKey="RES:reportspec" Enabled="(Fields!COMPLETED = True) andalso (Fields!NUMBERPROCESSED > 0)">
                    <c:ShowReport ReportID="ca6d8b40-2605-42e5-acf6-fb49fa9d2c94">
                      <c:ParameterValues>
                        <c:ParameterValue ID="PROCESSID">
                          <c:Value>
                            <c:SectionField>ID</c:SectionField>
                          </c:Value>
                        </c:ParameterValue>
                      </c:ParameterValues>
                    </c:ShowReport>
                  </Action>
                </AddAction>
              </AlterActions>
            </AlterDataListSection>
          </AlterSections>
        </AlterTab>
      </AlterTabs>
    </AlterPage>
  </AlterPages>
</AlterExistingPages>
```


Online Giving

- Updated the homegrown online giving platform to utilize the custom receipt templates
- Easy sync process when changes are made

 **Data List: Receipt Management Data List**

System record ID:	932bdb15-39bd-48ae-97f2-76503f52bd09
Description:	A data list showing receipt management records.
Author:	VCU
Date added:	11/30/2017 8:45:39 AM
Date changed:	11/30/2017 8:45:39 AM
User defined:	No
Context record type:	
Implementation:	SP (VCU_USP_DATA LIST_RECEIPTMANAGEMENT)
Security folder:	Radar\Marketing\ReceiptManagement
Installed products:	
Installed:	 Yes

[Output Fields](#) [Page References](#) [Dashboard References](#) [API](#)



Results

Results

- Donors get a much more personalized receipt with branding and acknowledgement wording specific to their area of support
- Unit stewardship offices can focus on acknowledging higher-level gifts
- Flexible receipt framework for managing updates and changes

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It now takes less time to process receipts, even though we have a more dynamic receipting process, including the new challenges with athletics receipting.



Challenges

Lessons learned

- SSRS is not predictable between export formats when dealing with tight spacing
- For ongoing maintenance it's easier to do more of the logic in SQL rather than SSRS expressions
- Needed clear policy on how to receipt split gifts between multiple foundations
- Embedded images in SSRS created a large file size and Reporting Services Web.Config required an update: `<httpRuntime executionTimeout="9000" maxRequestLength="20000" />`

Formatting challenges with SSRS

MCV Foundation



Donor: Mr. and Mrs. John Q. Smith II
Date: 12/31/2017
Unit: VCU Massey Cancer Center
Designation: Massey Cancer Center
Gift: \$100.00

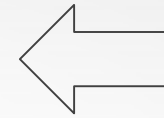
Donor ID: 8-10285554
Receipt No.: 61680

In honor of Jane Doe, 1982, In honor of Bill Jones

To comply with IRS requirements, this letter verifies that you have not received any substantial benefits in exchange for your gift. Please keep this letter for your tax records. If you have any questions, please contact the Office of Gifts & Records Management. (804) 828-0632 or email giving@vcu.edu.

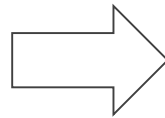


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Format when exported to PDF (correct)

Format when viewed in report viewer (incorrect)



MCV Foundation



Donor: Mr. and Mrs. John Q. Smith II
Date: 12/31/2017
Unit: VCU Massey Cancer Center
Designation: Massey Cancer Center
Gift: \$100.00

Donor ID: 8-10285554
Receipt No.: 61680

In honor of Jane Doe, 1982, In honor of Bill Jones



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Thank you!

Rob Downs
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Nate Parker
parker2jn@vcu.edu

Jenny Yoo
jjyoo@vcu.edu