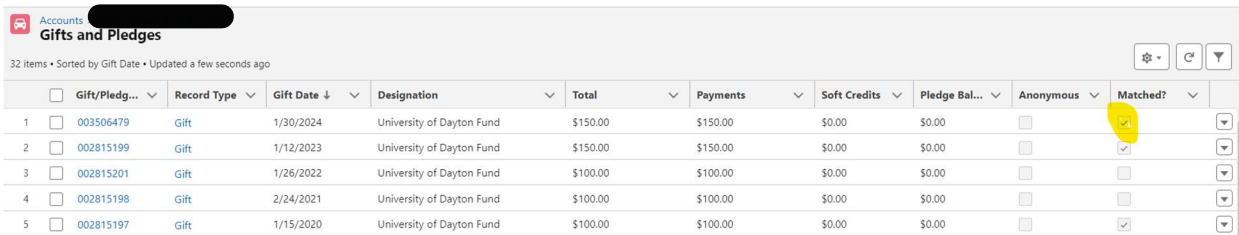


Matching Gifts

1. Donors are responsible for initiating matching gifts with their employer.
2. Emails from the company making the match are sent to the Records Inbox, and the gift is confirmed once the donor's gift has been received and processed by Records.
3. Occasionally, a donor will include a paper form with their gift and Records will fill it out and send it to the company making the match.
4. When the matching gift is received by Records, a matching gift pledge is entered on the original gift and is linked to the donor's employer.
5. The matching gift is then entered and applied to the pledge on the same day.
6. Once a gift has been matched, there is a check box to the right of the original gift on the donor's Gifts & Pledges page.



Accounts [redacted]
Gifts and Pledges

32 items • Sorted by Gift Date • Updated a few seconds ago

	<input type="checkbox"/> Gift/Pledge...	Record Type	Gift Date	Designation	Total	Payments	Soft Credits	Pledge Bal...	Anonymous	Matched?
1	<input type="checkbox"/> 003506479	Gift	1/30/2024	University of Dayton Fund	\$150.00	\$150.00	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	<input type="checkbox"/> 002815199	Gift	1/12/2023	University of Dayton Fund	\$150.00	\$150.00	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	<input type="checkbox"/> 002815201	Gift	1/26/2022	University of Dayton Fund	\$100.00	\$100.00	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
4	<input type="checkbox"/> 002815198	Gift	2/24/2021	University of Dayton Fund	\$100.00	\$100.00	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
5	<input type="checkbox"/> 002815197	Gift	1/15/2020	University of Dayton Fund	\$100.00	\$100.00	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>

7. To find out the matching gift company, go to the original gift (by clicking on the respective Gift/Pledge Number) and then click on the Matching tab.

Gift/Pledge

Fundraising Campaign

FY24

Gift Date

1/30/2024

Designation

University of Dayton Fund

Record Type

Gift

Total

\$150.00

Balance Due

\$0.00

All Details
 Matching
 Recognition Credits
 Notes
 Gift Attachments
 Other

 Match Links (1)

1 item • Updated a few seconds ago

View All

- Click on the Matching Gift number and you will be directed to the account of the company that made the match. Click View All to see all of the transactions.

Gift/Pledge

Fundraising Campaign

FY24

Gift Date

2/15/2024

Designation

University of Dayton Fund

Record Type

Matching Gift

Total

\$150.00

Balance Due

\$0.00

All Details
 Matching
 Recognition Credits
 Notes
 Gift Attachments
 Other

 Transactions (3)

View All

Account
 Fundraising Campaign
 Gift Date
 Credited Opportunity
 Acknowledgement
 Do Not Receipt

FY24
 2/15/2024
 Do Not Acknowledge
 ☒

Record Type
 Total
 Pledged Amount
 Balance Due

Matching Gift
 \$150.00
 \$150.00
 \$0.00

Status

■

Gifts and Pledges > 003507637

Transactions

3 items • Sorted by Transaction Date • Updated a minute ago

	Transaction Number	Designation	Transaction ...	Gift/Pledge Date	Method	Amount	Balance	Date Due
1	<input type="checkbox"/> 010624580	University of Dayton Fund	2/15/2024	2/15/2024	Pledge	\$150.00	\$0.00	
2	<input type="checkbox"/> 010624624	University of Dayton Fund	2/15/2024	2/15/2024	Wire	\$150.00	\$0.00	
3	<input type="checkbox"/> 010624625	University of Dayton Fund	2/15/2024	2/15/2024	Pledge	-\$150.00	\$0.00	

Third Party Matching Gifts


1. We also receive matching gift payments from third party sources. Some companies outsource their matching gifts to a separate company and that is who sends us the money.
 - An example of this is Charities Aid Foundation of America (18R566317). On 2/16/24 they sent a check for \$250.00 representing a matching gift from Baxter International Foundation (0C0203758) for Lori Dixon (000052495).
2. To identify the matching gift company and third party source from the donor's Account, go to the respective gift on their Gifts and Pledges page. Below, Lori Dixon's original gift on 11/30/23 shows the Matched check box. Click on the Gift/Pledge number.

Accounts > Dixon, Lori F. and Bill
Gifts and Pledges

18 items • Sorted by Gift Date • Updated a few seconds ago


	<input type="checkbox"/> Gift/Pledg...	Record Type	Gift Date	Designation	Total	Payments	Soft Credits	Pledge Bal...	Anonymous	Matched?	
1	<input type="checkbox"/> 003501662	Gift	11/30/2023	University of Dayton Fund	\$250.00	\$250.00	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
2	<input type="checkbox"/> 002634110	Gift	11/23/2022	University of Dayton Fund	\$250.00	\$250.00	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
3	<input type="checkbox"/> 002634120	Gift	4/11/2022	University of Dayton Fund	\$250.00	\$250.00	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
4	<input type="checkbox"/> 002634111	Gift	12/31/2021	Forever Marianist	\$250.00	\$250.00	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
5	<input type="checkbox"/> 002634122	Gift	4/16/2021	University of Dayton Fund	\$250.00	\$250.00	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
6	<input type="checkbox"/> 002634116	Gift	11/4/2020	University of Dayton Fund	\$250.00	\$250.00	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
7	<input type="checkbox"/> 002634119	Gift	12/20/2019	University of Dayton Fund	\$250.00	\$250.00	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
8	<input type="checkbox"/> 002634125	Gift	4/11/2019	University of Dayton Fund	\$250.00	\$250.00	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
9	<input type="checkbox"/> 002634114	Gift	11/26/2018	University of Dayton Fund	\$250.00	\$250.00	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
10	<input type="checkbox"/> 002634124	Gift	4/4/2017	Class Reunion Gift Fund	\$150.00	\$150.00	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
11	<input type="checkbox"/> 002634123	Gift	12/31/2016	University of Dayton Fund	\$250.00	\$250.00	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
12	<input type="checkbox"/> 002634121	Gift	12/2/2015	Christmas on Campus Fund	\$100.00	\$100.00	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
13	<input type="checkbox"/> 002634117	Gift	2/24/2015	I Love UD House Campaign	\$250.00	\$250.00	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
14	<input type="checkbox"/> 002634113	Gift	12/31/2014	Chapel Renovation	\$250.00	\$250.00	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="v"/>
15	<input type="checkbox"/> 002634112	Gift	3/5/2014	Chapel Renovation	\$250.00	\$250.00	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="v"/>
16	<input type="checkbox"/> 002634126	Pledge	11/12/1998	University of Dayton Fund	\$250.00	\$250.00	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
17	<input type="checkbox"/> 002634118	Pledge	11/26/1997	Accounting Designated Enrichme	\$150.00	\$150.00	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="v"/>
18	<input type="checkbox"/> 002634115	Pledge	4/19/1994	University of Dayton Fund	\$25.00	\$25.00	\$0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="v"/>

3. Go to the Matching tab on the next screen.

 Gift/Pledge [Redacted]








Fundraising Campaign FY24	Gift Date 11/30/2023	Designation University of Dayton Fund	Record Type Gift	Total \$250.00	Balance Due \$0.00
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All Details **Matching** Recognition Credits Notes Gift Attachments Other


 **Transactions (1)**

Transaction Number	Designation	Transaction Date	Gift/Pledge Date
010615710	University of Dayton Fund	11/30/2023	11/30/2023

[View All](#)




Account 	[Redacted]	Total 	\$250.00
Fundraising Campaign 	FY24	Pledged Amount 	\$0.00
Gift Date 	11/30/2023	Balance Due 	\$0.00
Acknowledgement 	Acknowledged	Record Type	Gift

4. Click on the Matching Gift number:

 Gift/Pledge [Redacted]

Fundraising Campaign FY24	Gift Date 11/30/2023	Designation University of Dayton Fund	Record Type Gift	Total \$250.00	Balance Due \$0.00
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All Details **Matching** Recognition Credits Notes Gift Attachments Other

 **Match Links (1)**  


1 item • Updated a few seconds ago

	Match Link Name	Matching Gift	Match Payments Due	Match Payments Made
1	<input type="checkbox"/> 000470034	<input checked="" type="checkbox"/> 003507664	\$0.00	\$0.00

[View All](#)

 **Match Potentials (0)** [New](#)

5. Click on the Transaction Number for transaction with Soft Credit listed as the Method.

 Gifts and Pledges > 003507664

Transactions

3 items • Sorted by Transaction Date • Updated a few seconds ago

<input type="checkbox"/> Transaction Number	Designation	Transaction Date	Gift/Pledge Date	Method	Amount	Balance	Date Due
1 <input type="checkbox"/> 010624629	University of Dayton Fund	2/16/2024	2/16/2024	Pledge	\$250.00	\$0.00	
2 <input type="checkbox"/> 010624650	University of Dayton Fund	2/16/2024	2/16/2024	Pledge	-\$250.00	\$0.00	
3 <input checked="" type="checkbox"/> 010624651	University of Dayton Fund	2/16/2024	2/16/2024	Soft Credit	\$250.00	\$0.00	

6. You will see that Baxter International Foundation received soft credit. Click on Originating Soft Credit Transaction to find the third party company.

Transaction Soft Credit				
Amount \$250.00	Designation Account Name Text University of Dayton Fund	Gift/Pledge Date 2/16/2024	Originating Soft Credit Gift 003507679	Soft Credit Gift Link

Related	Details
Transaction Type	Soft Credit
Account	Baxter International Foundation
Acknowledgement	
Description	
Originating Soft Credit Gift	003507679
Originating Soft Credit Transaction	010624648
Prior Commitment Payment	<input type="checkbox"/>
Recurring Gift	
Alert	
Gift/Pledge Date	2/16/2024
Conditional Pledge	<input type="checkbox"/>
Documented Legal Date	2/16/2024
Credited Year Override Date	
Credited Year	2/16/2024
VSE Constituent Category	Corporation
Campaign Appeal	FY24 Campaign Microsite
Legacy Receipt Number	
Post Date	

Source of Data	Checks
Transaction Date	2/16/2024
Amount	\$250.00
Record Type	Soft Credit
Designation	University of Dayton Fund
Restricted?	<input type="checkbox"/>
Debit Account	
Designation Account Number	340000-300000-620000-999999-999999
AQCV ConversionId	

7. The check was sent from Charities Aid Foundation of America.

Transaction Check				
Amount \$250.00	Gift/Pledge Date 2/16/2024	Designation Account Name Text University of Dayton Fund	Transaction Date 2/16/2024	Year 2.024

Related	Details
Transaction Type	Payment
Account	Charities Aid Foundation of America
Moving to new Account	<input type="checkbox"/>
Acknowledgement	Not Acknowledged
Description	
Prior Commitment Payment	<input type="checkbox"/>
Payment Number	
Recurring Gift	
Alert	
Name on Card	
Gift/Pledge Date	2/16/2024
Documented Legal Date	2/16/2024
Credited Year Override Date	
Credited Year	2/16/2024
VSE Constituent Category	Foundation
Third Party Payment	<input checked="" type="checkbox"/>
Credited Opportunity	
Campaign Appeal	A24
Signator	
Legacy Receipt Number	
Post Date	

Source of Data	Checks
Reference	
Transaction Date	2/16/2024
Amount	\$250.00
Record Type	Check
Method	Check
Designation	University of Dayton Fund
Designation Account Number	340000-300000-620000-999999-999999
Restricted?	<input type="checkbox"/>
Gift External ID	0014z00001v1PloAAE854.9967142111317
Donor Currency	
Currency Units	250.0000
Currency Exchange Rate	1.0000
Check Number	1,922,093
Transaction External ID	
Instrument	
Tax Amount	
Total Asset Amount	
VSE Deferred Gift	False
VSE Use	