

GIFT RECEIPTS

Overview

The following notes describe details for qualification used for generating gift receipts.

Criteria

The following criteria qualifies an entity to be included in this program:

A. Donors receiving primary (legal) credit for a gift transaction between yesterday and 1-month prior.

Exclusions:

- Deceased donors¹
- Payroll Deductions²
- Transactions with a suppress receipt³
- Transaction types of Contributed Services (SV), Bequests (BQ), Grant Installment (GI), Internal Transfer (IT), Government Gifts (GG), or Government Pledge Payments (GP).
- Payment types of Contributed Services (V) and Securities (S)

Business Rules

The following business rules were used to determine entity qualification in this program:

- ¹ Record type code of deceased/dissolved (D) or deceased/pending (P)
- ² Payment type of Payroll Deduction/Internal (D)
- ³ Utilizes suppress receipt smart field, which is defined as a transaction with a gift acknowledgment letter of suppress receipt (SR).

Revision History

The following revisions have been requested for this program:

- **March 10, 2003:** Request by Robb Drury to remove exclusion of securities transactions.
- **June 16, 2003:** Request by Cathy Rathbone to exclude Internal Transfers, Professional Development, Government Gifts, and Government Pledge Payments, and Contributed Services.
- **July 26, 2004:** Request by Robb Drury to remove exclusion of Professional Development transactions.
- **August 26, 2005:** Request by Cathy Rathbone to exclude securities transactions which are receipted by Foundation Trust staff.