

Streamlines advancement gift processing

Extends functionality of advancement CRMs

Empowers staff to focus on fundraising and donor relations

Transform your institution's gift processing

To optimize fundraising goals and donor relations, advancement offices and university-based foundations continue to focus on improving the efficiency of business operations. By investing in the right technology, processing gifts becomes faster than ever, enabling staff to reduce manual work and allowing more time for stewardship and donor relations.

With OnBase by Hyland, advancement offices and foundations leverage enterprise content management (ECM) to fully automate the receipt and processing of gifts. The solution also provides instant electronic retrieval of gifts and related documentation and seamlessly extends the functionality of advancement CRM systems to transform gift processing.



Streamlines advancement gift processing

Institutions know to stay competitive among peers, they need to process gifts quickly and accurately and speed acknowledgment to new and recurring donors.

With OnBase, advancement and foundation offices automate gift processing, allowing staff to devote more time and resources to stewardship and donor relations. OnBase provides a central digital repository for all gifts and related gift documentation, such as checks, cash, credit cards and more. After scanning the gifts into OnBase upon receipt, the solution extracts data using optical character recognition (OCR) and links it to the advancement CRM or another similar database. Advancement and foundation staff now are able to accelerate gift processing, reduce errors and eliminate manual data entry and other paper-based tasks.

Extends advancement CRM functionality for total efficiency

By integrating with the advancement CRM, OnBase enables the electronic management of all gift payments and related documents. To maintain the CRM as the system of record, OnBase makes a front- and back-side image of every incoming check. OnBase then deposits one image into the bank and the other into the ECM repository where it stores personal or private data – such as the check’s MICR number – in a redacted format. Every scanned check, along with related donor information is simultaneously indexed via metadata OnBase pulls from the documents. This gives staff instant access to all documents related to each gift and places them into appropriate workflow queues for reviews and approvals.

Integrating OnBase with the advancement CRM also enables staff to more efficiently receive and track complex giving arrangements – like when a single check contains gifts from multiple donors with various departmental designations. For institutions that partner with caging or lockbox providers, it also easily integrates with these services for secure data transfer, giving advancement staff full control of their gift-related data and documentation.

Empowers staff to focus on fundraising and donor relations

As the amount of employees and resources dedicated to advancement and foundation offices continues to shrink, staff must devote as much time as possible nurturing and acknowledging their donors – and less time on manual, back-office tasks. With electronic gift processing, staff handles audit and compliance reporting with ease. With all gifts and related documents instantly retrievable, auditors complete their tasks independently and quickly, enabling advancement staff to stay focused on building donor relations.

Additionally, OnBase gives staff full control over maintenance of donor anonymity and privacy. Through redaction and permission-based viewing, advancement and foundation offices easily meet donor internal and external privacy regulations.

Learn more at OnBase.com/Advancement »

“We needed to give our advancement team the ability to process donor gifts faster and ensure those gifts are quickly acknowledged so donors know of our gratitude. With OnBase, we spend more of each day making our donors happy or talking with new donors and significantly less time and resources dealing with manual paper and data entry tasks.”

– John Public, Director of Advancement Services,
Colorado State University Foundation

OnBase[®]
by Hyland