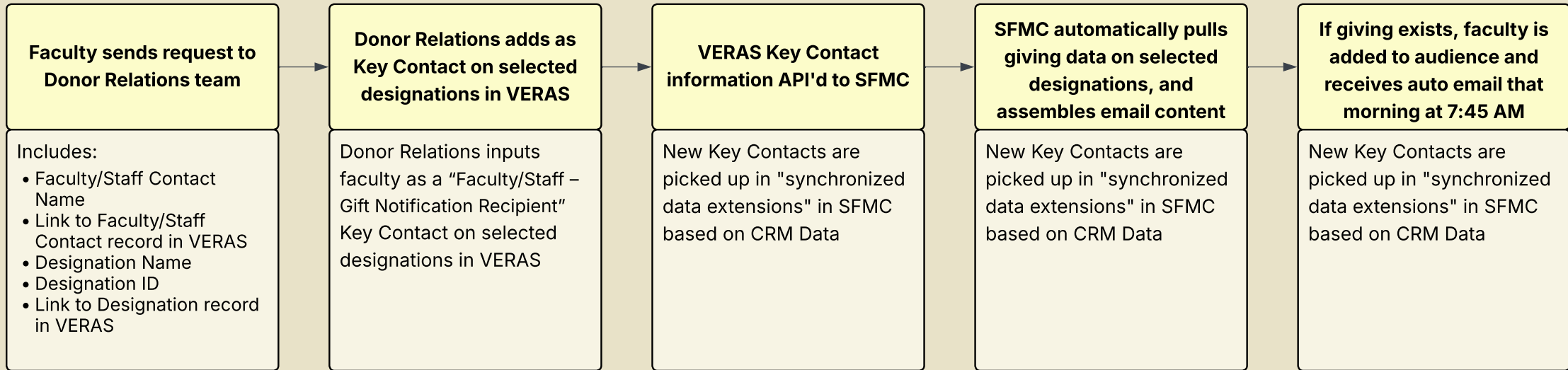


Gift and Pledge Email Notifications to Non-VERAS Users





Individual Email Result

AAE_DR_faculty_gift_notification_EML

Related

Details

Tracking As Of ⓘ

2/26/2026, 10:33 AM

Email Name

AAE_DR_faculty_gift_notification_EML

From Name

Emory University - Advancement and Alumni Engagement

From Address

advancement@inspire.emory.edu

Subject Line

New Gifts & Pledges - Designations You Follow

Contact

[David N. Hurtado](#)

Lead

Date Sent

2/26/2026, 7:47 AM

Created By

[MC Connect](#), 2/26/2026, 10:33 AM

Triggered Send

[AAE_DR_faculty_gift_notificat - fd19ceb4ecd249b3b6a6f472049c41f4](#)

Triggered Send Name ⓘ

AAE_DR_faculty_gift_notificat - fd19ceb4ecd249b3b6a6f472049c41f4

Send Definition ⓘ

Hard Bounce ⓘ

0

Soft Bounce ⓘ

0

Date Bounced ⓘ

Opened ⓘ

✓

Date Opened ⓘ

2/26/2026, 9:23 AM

Number of Total Clicks ⓘ

0

Links Clicked ⓘ

0

Date Unsubscribed ⓘ

Last Modified By

[MC Connect](#), 2/26/2026, 10:33 AM

Email Thumbnail



Virtual Emory Relationship Advancement System

Gift & Pledge Email Notifications for Non-VERAS Users (Faculty and Staff)

Process Owner: Donor Relations

Version: 1.0

The **Gift & Pledge Email Notifications** are a daily, automated email notification created to provide key non-VERAS user faculty and staff with a timely but tailored update of gifts and pledges given to the self-selected designations that they care most about. These emails are sent through **Salesforce Marketing Cloud (SFMC)**, but the content is informed by giving and designation data within VERAS.

Emails are sent only when qualifying activity exists. Anonymous donors/gifts are excluded, and donor details, such as contact information, are displayed only where permissible. The email shows new gifts and pledges that were posted or closed “yesterday”; however, the Donor Date may fall within the past 30 days in cases where processing was delayed.

Enrollment for the notification is accomplished through the Donor Relations team. Maintenance of the automation, journey, and email is handled by the Advancement Systems team.

Instructions

Eligibility of a Non-VERAS User

- Current Emory University or Emory Healthcare faculty/staff.
- Not an AAE staff member and no VERAS access.
- Must exist in VERAS with a deliverable email address and with the “Do Not Contact” field set to false.
- Must have a legitimate stewardship or fund-related need.
- Must be coded as a “Faculty/Staff – Gift Notification Recipient” Key Contact on selected designations (see enrollment steps below).

How It Works

1. Faculty/Staff person requests enrollment by submitting the following information to donor.relations@emory.edu.
2. Donor Relations reviews requests and enrolls by coding requestees as “Faculty/Staff – Gift Notification Recipient” Key Contacts on the designations of their choosing in VERAS.
3. Salesforce Marketing Cloud then picks up these codes and programmatically assembles and sends emails automatically.
 - If new qualifying activity exists (up to 30 days back for delayed posting), an email is generated and sent.
 - If no activity exists, no email is sent
 - Email content is dynamically generated using AMPScript and VERAS data.
4. Emails are sent unless/until the faculty/staff member becomes no longer eligible, or requests removal.

Enrollment Steps

1. To sign up, request via email to donor.relations@emory.edu, and provide the following:
 - Faculty/Staff Contact Name
 - Link to Faculty/Staff Contact record in VERAS
 - Designation Name (maximum of 10 designations per person)
 - Designation External ID
 - Link to Designation record in VERAS
2. Donor Relations will vet the request.
3. When/If eligibility is confirmed, Donor Relations will add the requestee as a Key Contact on the designation(s) of their choosing, with a Key Contact Role of “Faculty/Staff – Gift Notification Recipient”.
4. Once added, the requestee will begin receiving email notifications by the next day’s automation.

“Yesterday’s Gifts (by Designation)” and “Yesterday’s Pledges (by Designation)” Reports for VERAS Users

Two different audiences—each with distinct data needs and licensing restrictions—required two different solutions.

This Salesforce Marketing Cloud based “Gift & Pledge Email Notifications” offering was intentionally designed for faculty and staff without VERAS access who still need time-sensitive but streamlined visibility into gift activity on specific designations.

For AAE VERAS Users who would like to receive similar information, but with the full benefits of their VERAS license/access, there are separate solutions available through native VERAS reports; [Yesterday’s Gifts \(by Designation\)](#) and [Yesterday’s Pledges \(by Designation\)](#).

The data provided in these two reports is significantly more robust and intentionally designed to support frontline fundraising. They include direct links to records, along with capacity, opportunity, and other sensitive details that are not shared through the external SFMC email notifications. VERAS users can self-subscribe, choose their preferred email cadence, track multiple designations, and subscribe to multiple reports as needed. In addition, each report can be cloned and customized to include additional fields tailored to your role—making this the most comprehensive and actionable option for staying on top of new gifts to important designations.

For more information, including instructions on how to enroll for these VERAS user reports, please see [Reports - Yesterdays Gifts \(by Designation\) and Yesterdays Pledges \(by Designation\)](#).

For additional support and questions, please contact ADV-Help@emory.edu.

Version Control

Version	Effective Date	Editor	Summary of Changes
1.0	01/03/2026	David Hurtado	Original process document

Special Projects

Gifts & Pledges Notification for Non-VERAS Users (Faculty and Staff)

We're excited to launch a new Salesforce Marketing Cloud (SFMC) automated Journey to proactively keep key faculty and staff partners informed about gift and pledge activity for the designations they care about. Inspired by earlier AWA notifications, this release is a significant, intentional upgrade that delivers a cleaner, more faculty-friendly email experience.

Why Is This Needed

Many faculty and staff play a meaningful role in cultivating and stewarding donor relationships but don't have access to VERAS reporting, where the overhead and cost would be significant. This solution bridges that gap by delivering timely, fund-specific insights directly to these crucial campus partners, supporting relationship-building and coordinated stewardship without expanding system access or broadly sharing donor data.

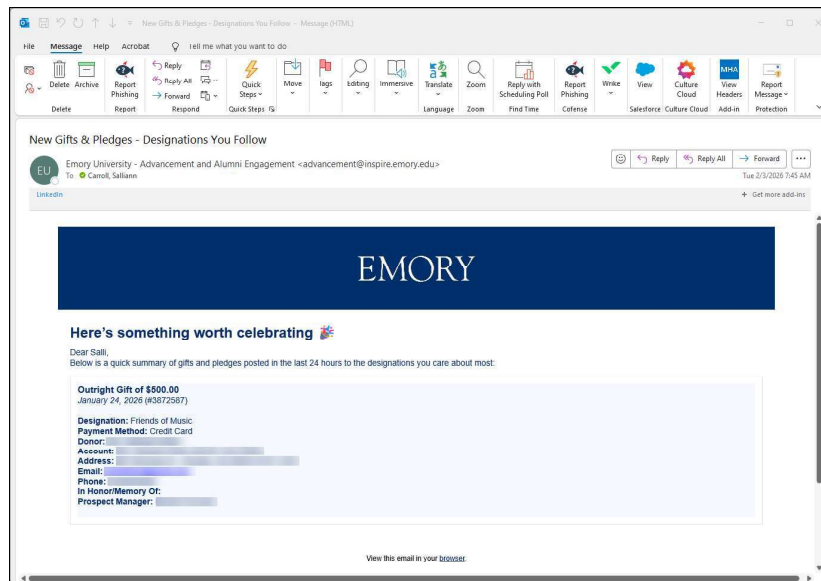
What the Email Includes

When there's qualifying activity, recipients receive a polished, easy-to-read email highlighting:

- New outright gifts
- New pledge payments
- Newly created pledges

The email includes items posted (created) the prior day, but with donor dates possibly up to 30 days old (to account for delayed posting). If there is no qualifying gift or pledge activity, **no email is sent**, ensuring notifications remain intentional and meaningful.

Content is dynamically generated using AMP Script driven templates informed by VERAS giving data. To protect donor privacy, anonymous donors and anonymous gifts are proactively excluded, and donor contact information (address, email, phone) is displayed only when the donor is contactable through that channel. Prospect Manager details and Honor/Memory information are included when applicable.



Who Can Receive These Notifications

This offering was intentionally designed for faculty and staff without VERAS access who need time-sensitive visibility into gift activity on specific designations. Eligible recipients must be an Emory University or Emory Healthcare faculty/staff member and must exist in VERAS with a valid, deliverable Emory email address.

This solution is available upon request to eligible non-AAE faculty and staff. AAE staff with VERAS user licenses continue to benefit from full gift and pledge visibility through VERAS reporting, leveraging their existing system access and reporting capabilities.

Please note that these notification emails do not support a CC capability. Instead, AAE staff who work closely with these campus partners can gain insight via the [Individual Email Results](#) section of VERAS, which displays Salesforce Marketing Cloud emails sent to a contact within the past 30 days. Individual Email Results can be found by going to the campus partner's VERAS Contact record > Details > Individual Email Results. The section is only visible if emails within the past 30 days exist.

Subscription Management & Donor Relations Oversight

Subscriptions are managed through Key Contacts on the LL- Chart of Accounts (designation) object, which tracks individuals who have a close relationship or affinity with a specific fund. The Donor Relations team is responsible for creating and maintaining these Key Contact records. Per request from an AAE staff member, Donor Relations will add faculty/staff wanting to receive notifications as a Key Contact with the Role value of "Faculty/Staff – Gift Notification Recipient" on their requested designations ([see above](#)).

This model provides clear, transparent visibility into which campus partners are enrolled for which funds and supports auditability. Donor Relations oversight is a core strength of this design, given the sensitive and near-real-time nature of gift data.


How to Enroll a non-VERAS User to Receive These Notifications

To enroll a faculty or staff member, please send an email to donor.relations@emory.edu with the following information:

- Faculty/Staff Contact Name
- Link to Faculty/Staff Contact record in VERAS
- Designation Name
- Designation External ID
- Link to Designation record in VERAS

Upon successful enrollment for the notification emails, Donor Relations will confirm with the AAE staff member requesting once enrollment is complete. Additionally, Donor Relations will provide useful context and information guiding the recipient on AAE's gift/pledge receipting process, how to use the information provided, what information is included or excluded, and definitions of some of the terminology displayed.

For more information, please see the job aid  [Email Notifications - New Gift & Pledge Email Notifications for Non-VERAS Users of Faculty and Staff.pdf](#)

Please Note: *This SFMC notification email was created for non-VERAS users.* For AAE VERAS Users who would like to receive similar information, but with the full benefits of their VERAS license/access, there are separate solutions available through VERAS directly: [Yesterday's Gifts \(by Designation\)](#) and [Yesterday's Pledges \(by Designation\)](#). The data provided in these two reports is significantly more robust and intentionally designed to support frontline fundraising. They include direct links to records, along with capacity, opportunity, and other sensitive details that are intentionally *not* shared through the external SFMC email notifications. For more information, including instructions on how to subscribe to these VERAS user reports, please see the job aid  [Reports - Yesterdays Gifts \(by Designation\) and Yesterdays Pledges \(by Designation\).pdf](#).