



PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook

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Contents

General Preface

About This PeopleBookxxvii

PeopleSoft Application Prerequisites.....xxvii

PeopleSoft Application Fundamentals.....xxvii

Related Documentation.....xxviii

 Obtaining Documentation Updates.....xxviii

 Ordering Printed Documentation.....xxviii

Typographical Conventions and Visual Cues.....xxix

 Typographical Conventions.....xxix

 Visual Cues.....xxx

Comments and Suggestions.....xxxi

Common Elements in These PeopleBooks.....xxxi

Preface

PeopleSoft Contributor Relations Preface.....xxxiii

PeopleSoft Application Fundamentals.....xxxiii

 Common Elements Used in This PeopleBook.....xxxiv

Chapter 1

Getting Started With PeopleSoft Contributor Relations Solutions.....1

PeopleSoft Contributor Relations Business Processes.....1

PeopleSoft Contributor Relations Solutions Implementation.....2

Chapter 2

Setting Up Your PeopleSoft Contributor Relations Framework.....3

Completing CR Installation.....3

 Page Used to Complete CR Installation.....3

 Using the CR Installation Page.....3

Defining User Defaults.....7

 Pages Used to Define User Defaults.....7

 Setting Operator Defaults.....7

 Selecting Profile/Compare Columns Settings.....9

 Selecting Custom Bio Bit/Brief Setup Settings.....9

Setting Up Institution Defaults.....	10
Pages Used to Set Up Institution Defaults.....	11
Setting Institution Default Values.....	11
Setting up the Bio Bit and Bio Brief Reports.....	13
Setting Further Institution Default Values.....	13
Setting Up Institution Table Security.....	14
Page Used to Set Up Institution Table Security.....	15
Setting Institution Table Security.....	15
Defining and Securing Contributor Relations Business Units and SetIDs.....	15
Understanding Contributor Relations Business Units and SetIDs.....	16
Pages Used to Define and Secure Contributor Relations Business Units and SetIDs.....	17
Creating Contributor Relations Business Units.....	17
Implementing Functional Group Security.....	19
Defining Functional Group Components.....	20
Choosing Component Search Record Settings.....	21
Securing Contributor Relations Business Units.....	22
Understanding Business Units and the Commitment Entry Process.....	23
Understanding Business Units and the Membership Process.....	23
Examining a Query Security Example.....	24
Adding Resources.....	27
Understanding Resources.....	27
Pages Used to Add Resources.....	30
Adding Staff and Adding Volunteers.....	30
Defining Units.....	31
Defining Roles.....	31
Defining Staff, Unit, and Volunteer Roles.....	33
Viewing Staff Members and Volunteers.....	33

Chapter 3

General Functions Used Throughout the System.....	35
Using the Spouse Link.....	35
Working With Worksets.....	35
Understanding Worksets.....	35
Pages Used to Create and Join Worksets.....	36
Creating a Workset.....	37
Joining Worksets.....	38
Building a Workset From a Page in the System.....	39
Creating Service Indicators.....	40

Chapter 4

Setting Up Constituent Data.....	41
Prerequisites.....	41
Defining Constituent Types.....	42
Understanding Constituent Types.....	42
Page Used to Define Constituent Types.....	43
Using the Define Constituent Types Page.....	43
Defining Involvement Categories.....	44
Page Used to Define Involvement Categories.....	44
Using the Involvement Categories Page.....	44
Defining Involvement Types.....	45
Page Used to Define Involvement Types.....	45
Using the Involvement Types Page.....	45
Defining Involvement Codes.....	46
Understanding Involvement Codes.....	46
Page Used to Define Involvement Codes.....	47
Using the Involvement Codes Page.....	47
Establishing Relationships.....	47
Understanding Relationships.....	48
Common Elements Used in This Section.....	48
Pages Used to Establish Relationships.....	48
Establishing a Person to Person Relationship.....	49
Establishing an Organization to Organization Relationship.....	50
Establishing a Person to Organization Relationship.....	50
Establishing an Organization to Person Relationship.....	51
Defining Person and Organization Relationships.....	52
Page Used to Define Person and Organization Relationships.....	52
Using the Person/Org Relationships Page.....	52
Defining Organization Reciprocal Relationships.....	53
Page Used to Define Organization Reciprocal Relationships.....	53
Using the Reciprocal Relationship Page.....	53
Setting Up Contact Types.....	53

Chapter 5

Setting Up Prospects.....	55
Prerequisites.....	55
Setting Up Prospect Identifiers.....	55
Pages Used to Set Up Prospects.....	56
Defining Asset Types.....	59

Defining Rating Types.....	59
Defining Rating Categories.....	60
Defining Rating Indicators.....	60
Defining Action Types.....	61
Defining Action Contact Types.....	62
Defining Action Status Codes.....	63
Defining Action Results.....	63
Defining Donor Appreciation Items.....	64
Setting Up Service Indicators.....	65

Chapter 6

Setting Up Initiatives.....	67
Understanding Initiatives.....	67
Prerequisites.....	67
Initiatives.....	68
Defining Initiative Types.....	69
Page Used to Define Initiative Types.....	70
Defining Initiative Types.....	70
Defining Audiences.....	71
Pages Used to Define Initiative Audiences.....	72
Setting Up Attribute Types.....	72
Entering Audience Criteria.....	74
Defining Initiative Goal Types.....	76
Page Used to Define Initiative Goal Types.....	76
Defining Goal Types.....	77
Defining Methods.....	77
Page Used to Define Methods.....	78
Setting Up Communication Methods.....	78
Using Action Components for Initiative Setup.....	78
Defining Action Types for Initiatives.....	79
Defining Action Contact Types for Initiatives.....	79
Defining Action Status Codes for Initiatives.....	79
Defining Action Results for Initiatives.....	79
Defining Budget Categories.....	79
Page Used to Define Budget Categories.....	80
Setting Up Budget Categories.....	80
Setting Up Appeal Information.....	80
Pages Used to Set Up Appeal Information.....	81
Setting Up Appeal Types.....	83

Setting Up Appeals.....	83
Setting Up Appeal Details.....	84

Chapter 7

Setting Up Campaigns.....	87
Understanding Campaign Setup.....	87
Prerequisites.....	87
Setting up General Initiative Information.....	87
Defining Donor Phases.....	88
Page Used to Define Donor Phases.....	88
Setting up Donor Phases.....	88
Setting Up an Anticipated Gift Table.....	89
Page Used to Set Up an Anticipated Gift Table.....	89
Entering Gift Table Information.....	89
Setting Up Reporting Rules.....	91
Page Used to Set Up Reporting Rules.....	91
Defining Reporting Rules.....	91

Chapter 8

Setting Up Membership Initiatives.....	95
Understanding Membership Setup.....	95
Prerequisites.....	95
Setting up General Initiative Information.....	96
Defining Membership Types.....	96
Page Used to Define Membership Types.....	96
Setting Up Membership Types.....	96
Defining Membership Categories.....	97
Page Used to Define Membership Categories.....	97
Setting Up Membership Categories.....	97

Chapter 9

Setting Up Volunteer Efforts.....	99
Understanding Volunteer Setup.....	99
Prerequisites.....	99
Common Elements Used in This Chapter.....	100
Setting Up General Initiative Information.....	100
Setting Up Volunteer Resources.....	101

Defining Basic Volunteer Setup Data.....	101
Pages Used to Set Up Volunteer Data.....	101
Defining Areas of Responsibility.....	102
Defining Assignment Types.....	102
Defining Leadership Types.....	103
Defining Volunteer Initiative Goals.....	104
Page Used to Define Volunteer Initiative Goals.....	104
Defining Volunteer Goals.....	104
Defining a Volunteer Structure.....	104
Pages Used to Define a Volunteer Structure.....	105
Structuring the Leadership Group.....	105
Defining Subgroups.....	106

Chapter 10

Setting Up Event Initiatives.....	109
Understanding Event Initiative Setup.....	109
Prerequisites.....	109
Setting up General Initiative Information.....	109
Setting Up Event Types.....	110

Chapter 11

Setting Up Other Initiatives.....	111
Understanding Other Initiative Setup.....	111
Prerequisites.....	111

Chapter 12

Setting Up Commitment Management.....	113
Prerequisites.....	113
Defining Gift Types.....	114
Page Used to Define Gift Types.....	115
Setting Up Gift Types.....	115
Defining Tender Types.....	116
Page Used to Define Tender Types.....	116
Setting Up Tender Types.....	116
Defining Designation Types.....	117
Page Used to Define Designation Types.....	117
Setting Up Designation Types.....	117

Defining Matching Gift Types for Designations.....	118
Page Used to Define Matching Gift Types for Designations.....	118
Setting Up Matching Gift Types.....	118
Defining Designation Funds.....	119
Pages Used to Define Designation Funds.....	119
Beginning Designation Funds Setup.....	119
Completing Designation Funds Setup.....	121
Defining Recognition Types.....	123
Page Used to Define Recognition Types.....	123
Setting Up Recognition Types.....	123
Defining Adjustment Reasons.....	124
Page Used to Define Adjustment Reasons.....	124
Setting Up Adjustment Reasons.....	124
Preparing for Session Posting.....	125
Using the Budget Period Page.....	125
Setting Up Item Types.....	125
Completing the Item Type Initial Setup Page.....	126
Defining a GL Interface.....	126
Defining Journal Entry Definitions.....	127
Defining a Journal Source.....	128
Defining Journal Generator Template Defaults.....	128
Preparing for Acknowledgement Letters and Receipts.....	128
Defining Acknowledgement Rules.....	129
Common Elements Used in This Section.....	129
Pages Used to Define Acknowledgement Rules.....	130
Setting Up Acknowledgements.....	130
Continuing Acknowledgement Setup.....	131
Completing Acknowledgement Setup.....	131
Defining an Organization's Matching Gift Rules.....	132
Pages Used to Define Organization Matching Gift Rules.....	133
Setting Up Matching Gift Rules.....	133
Setting Up Matching Gift Restrictions.....	136
Setting Up Required Information.....	137
Defining Giving Club Information.....	138
Pages Used to Set up Giving Club Information.....	138
Defining Giving Clubs.....	138
Defining Giving Club Levels.....	140
Setting Up Credit Card Processing.....	141
Pages Used to Set Up Credit Card Processing.....	142
Setting Up a Connection With a Third-Party Processor.....	142

Defining Payment Methods.....	142
Defining Credit Card Types.....	142
Defining Connection Parameters for Third-Party Processor.....	144
Associating Merchant Table With Business Unit.....	145
Setting Up Self-Service Online Giving and Pledges.....	146
Pages Used to Set Up Self-Service Online Giving.....	147
Defining Involvement Settings.....	147
Defining Web Designations.....	150
Defining Web Appeals.....	151
Defining Web Campaigns.....	153
Entering a Web Campaign Narrative.....	154
Defining Campaign Linked Designations.....	155
Defining Campaign Linked Appeals.....	156
Defining Giving Vehicles.....	157

Chapter 13

Managing Constituent Data.....	159
Searching for Records.....	160
Understanding Records.....	160
Pages Used to Search for Records.....	160
Using Search/Match.....	161
Using CR Search.....	161
Viewing CR Search Results.....	162
Using Organization Search.....	164
Adding People to Your System.....	164
Pages Used to Add People to Your System.....	165
Entering Names.....	165
Entering Bio/Demo Data.....	165
Entering Addresses and Phone Data.....	166
Managing Addresses and Phone Numbers.....	166
Pages Used to Manage Addresses and Phone Numbers.....	166
Updating Linked Addresses.....	167
Entering Electronic Addresses.....	167
Viewing Address Data.....	167
Tracking External System IDs.....	167
Managing Names.....	167
Maintaining Constituent Types.....	168
Understanding Constituent Types.....	168
Pages Used to Maintain Constituent Types.....	168

Assigning Constituent Types.....	168
Tracking Religious Preferences.....	169
Maintaining Photos.....	169
Adding Constituent Types to Graduates.....	170
Page Used to Add Constituent Types to Graduates.....	170
Running the Graduates to Alumni Process.....	170
Maintaining Degree Information.....	171
Pages Used to Maintain Degree Information.....	172
Maintaining External Degree Information.....	173
Setting a Constituent's Preferred Year.....	174
Entering Internal Legacy Degree Information.....	175
Maintaining Work Experience Information.....	176
Pages Used to Maintain Work Experience Information.....	177
Adding Organizations.....	177
Entering Location Data for Organizations.....	177
Entering Department Data for Organizations.....	178
Entering Contact Data for Organizations.....	178
Maintaining Organization Financial Information.....	178
Page Used to Maintain Organization Financial Information.....	178
Using the Organization Financial Info Page.....	178
Defining an Organization's Matching Gift Rules.....	180
Viewing an Organization's Matching Gift Rules.....	180
Reviewing Organization Data.....	181
Viewing an Organization's Employee List.....	181
Page Used to View an Organization's Employee List.....	181
Viewing Employee Lists.....	181
Viewing Profiles.....	181
Understanding Person Profile Views.....	182
Pages Used to View Profiles.....	183
Viewing General Person Profile Information.....	183
Viewing a Biographic Profile.....	186
Viewing a Commitment Profile.....	188
Viewing a Participation Profile.....	188
Viewing an Organizational Profile.....	190
Updating a Donor's Record/Adding a Donor.....	191
Viewing a Constituent's Audience History.....	191
Page Used to View a Constituent's Audience History.....	191
Reviewing Audience History.....	191
Maintaining Involvement Information.....	192
Understanding Involvement.....	192

Pages Used to Maintain Involvement Information.....	193
Adding Involvement Records.....	195
Filtering Involvement Records.....	196
Creating an Involvement Roster.....	196

Chapter 14

Managing Prospects.....	199
Understanding Prospect Management.....	199
Prerequisites.....	199
Creating Resource Assignments.....	199
Common Elements Used in This Section.....	200
Pages Used to Create Resource Assignments.....	200
Creating Mass Staff Assignments.....	203
Creating Mass Unit Assignments.....	204
Creating Mass Volunteer Assignments.....	205
Creating Individual Staff Assignments.....	205
Creating Individual Volunteer Assignments.....	206
Creating Individual Unit Assignments.....	207
Viewing the Prospects Assigned to a Resource.....	207
Viewing Resource Assignments.....	208
Generating the Role Assignments Report.....	209
Creating Prospect Strategies.....	211
Pages Used to Create Prospect Strategies.....	212
Creating a Strategy.....	212
Viewing Actions Linked to a Strategy.....	214
Viewing a Strategy Summary.....	215
Viewing Prospect Strategy Details.....	215
Tracking Prospect Data.....	215
Common Element Used in This Section.....	215
Pages Used to Track Prospect Information.....	216
Creating a Biographic Narrative.....	218
Maintaining Personal Assets.....	219
Viewing Personal Assets.....	220
Maintaining Ratings.....	220
Viewing Ratings.....	222
Viewing a Prospect's Philanthropic Interests.....	222
Creating a Biographic Profile.....	222
Implementing a Prospect Plan.....	223
Pages Used to Implement a Prospect Plan.....	224

Clearing a Prospect.....	228
Defining Mass Action Parameters.....	229
Defining Additional Mass Action Parameters.....	231
Creating Individual Prospect Actions.....	231
Entering Action Information.....	233
Completing Actions.....	234
Writing a Contact Report.....	235
Maintaining Donor Appreciation Items.....	237
Viewing a List of Appreciation Items Given.....	238
Viewing Donor Appreciation Details.....	238
Viewing Clearances.....	239
Filtering Actions.....	240
Viewing Existing Actions.....	242
Viewing Action Details.....	242
Viewing Contact Reports.....	243
Viewing Contact Report Details.....	244
Viewing Your To Do List.....	244

Chapter 15

Managing Planned Giving Prospects.....	247
Understanding Planned Giving Prospect Management.....	247
Common Elements Used in This Chapter.....	247
Tracking Bequests.....	249
Pages Used to Track Bequests.....	250
Defining Bequest Details.....	250
Defining Constituent Bequest Details.....	251
Defining Institutional Bequest Information.....	252
Tracking Trusts.....	252
Pages Used to Track Trusts.....	253
Defining Trust Details.....	253
Defining Trust Gift Information.....	255
Defining Trust Account Information.....	256
Defining Trust Beneficiaries.....	256
Defining Institutional Trust Information.....	257
Tracking Gift Annuities.....	258
Pages Used to Track Annuities.....	258
Defining Gift Annuity Details.....	258
Defining Gift Annuity Beneficiaries.....	260
Defining Institutional Gift Annuity Information.....	260

Tracking Pooled Income Funds.....	261
Pages Used to Track Pooled Income Funds.....	261
Defining Pooled Income Fund Details.....	261
Defining Pooled Income Fund Beneficiaries.....	263
Defining Institutional Pooled Income Fund Information.....	263
Working With a Planned Giving Profile.....	264
Pages Used to Work With a Planned Giving Profile.....	265
Viewing a Planned Giving Profile.....	266

Chapter 16

Managing Initiatives.....	269
Understanding Initiatives.....	269
Prerequisites.....	270
Defining an Initiative.....	270
Pages Used to Create Initiatives.....	271
Creating an Initiative.....	271
Defining an Initiative Audience.....	273
Understanding Audiences.....	273
Pages Used to Create an Initiative Audience.....	274
Defining the Audience.....	276
Building the Audience.....	277
Merging the Audience.....	278
Linking Related Initiatives.....	278
Page Used to Link Related Initiatives.....	279
Assigning Related Initiatives.....	279
Assigning Initiative Resources.....	280
Page Used to Assign Initiative Resources.....	280
Assigning Initiative Resources.....	280
Defining a Public Relations Plan.....	282
Page Used to Define a PR Plan.....	282
Defining a Public Relations Plan.....	283
Creating an Initiative Budget and Tracking Expenses.....	284
Pages Used to Create a Budget and Track Expenses.....	285
Creating a Budget.....	285
Tracking Budget Expenses.....	286
Creating Initiative Actions.....	287
Pages Used to Create Initiative Actions.....	288
Using the Initiative Action Page.....	288
Adding Action Information.....	289

Viewing Action Summary Information.....	290
Pages Used to View Action Summary Information.....	291
Viewing Your To Do List.....	291
Viewing Initiative Action Summary Information.....	291
Viewing Action Details.....	291
Viewing Related Goals.....	292
Page Used to View Related Goals.....	292
Viewing Related Goal Information.....	292
Viewing Responsible Staff for Related Initiatives.....	292
Page Used to View Responsible Staff for Related Initiatives.....	293
Using Mass Change for Initiative and Membership Letters.....	293
Understanding Mass Change.....	293
Understanding the Initiative Mass Change Template.....	294
Understanding the Membership Mass Change Template.....	295
Pages Used to Run Mass Change Processes.....	297
Selecting Criteria and Defaults.....	298
Running Mass Change.....	298

Chapter 17

Managing Campaigns.....	301
Understanding Campaign Management.....	301
Prerequisites.....	302
Managing General Initiative Information.....	303
Setting Campaign Initiative Goals.....	303
Pages Used to Set Campaign Initiative Goals.....	303
Setting Intermediate Goals for Campaigns.....	304
Setting Annual Goals.....	304
Setting Department Goals.....	306
Setting Unit Goals.....	306
Viewing a Prospect List.....	307
Pages Used to View a Prospect List.....	308
Viewing Prospects.....	308
Generating the Campaign Progress Report.....	308
Page Used to Generate Campaign Progress Reports.....	308
Generating Campaign Progress Reports.....	308
Viewing the Top Donors to a Campaign.....	309
Page Used to View Top Donors.....	310
Viewing Top Donor Summaries.....	310
Viewing a Summary of Campaign Initiatives.....	310

Pages Used to View a Summary of Campaign Initiatives.....	310
Using the Campaign Summary Page.....	310
Using the Initiative Detail Page.....	311

Chapter 18

Managing Membership.....	313
Understanding Membership.....	313
Prerequisites.....	314
Common Elements Used in This Chapter.....	314
Managing General Initiative Information.....	314
Creating a Member Organization.....	315
Understanding Member Organizations.....	315
Pages Used to Create a Member Organization.....	316
Defining the Member Organization.....	316
Setting Member Criteria.....	317
Defining Membership Objectives.....	318
Defining Membership Dues.....	319
Assigning Membership Resources.....	321
Building and Merging the Membership List.....	323
Pages Used to Build and Merge Membership Lists.....	323
Building the Member List.....	323
Merging the Member List.....	324
Defining Membership Initiative Goals.....	325
Pages Used to Define Membership Initiative Goals.....	325
Setting Intermediate Goals for Membership Initiatives.....	325
Setting Annual Goals for Membership Initiatives.....	326
Entering Member Dues.....	328
Understanding Membership Dues.....	328
Understanding Gift Processing in Membership Sessions.....	328
Common Element Used in This Section.....	329
Pages Used to Enter Member Dues.....	330
Entering Dues Payment Detail.....	330
Entering Check or Credit Card Information.....	335
Assigning Membership Designations and Associating Others With a Membership.....	337
Processing Member Credit Card Transactions.....	339
Adjusting Membership Dues Payments.....	339
Understanding Membership Dues Payments.....	340
Pages Used to Adjust Membership Dues Payments.....	340
Selecting Posted Dues Transactions to be Adjusted.....	340

Adjusting Dues Payment Details.....	341
Adjusting Designation and Associated Constituent Information.....	342
Preparing for Membership Letters.....	344
Viewing Membership Progress.....	344
Page Used to View Membership Progress.....	345
Using the Membership Progress page.....	345
Viewing Membership History.....	346
Pages Used to View Membership History.....	347
Viewing Membership Benefit History.....	347
Page Used to View Membership Benefit History.....	348
Viewing a Membership Summary or a Supervisor's Membership Summary.....	348
Page Used to View a Membership Summary.....	348
Viewing Membership Summary Information.....	348

Chapter 19

Managing Volunteers.....	351
Understanding Volunteer Management.....	351
Prerequisites.....	351
Managing General Initiative Information.....	352
Assigning Volunteers to Roles.....	352
Pages Used to Assign Volunteers to Roles.....	353
Assigning Volunteers to Roles Within the Structure.....	353
Creating Sub-Group Assignments.....	354
Assigning Volunteers to Specific Tasks.....	354
Prerequisites.....	355
Pages Used to Assign Volunteers to Specific Tasks.....	355
Assigning Volunteers and Groups to Tasks.....	355
Entering Constituent Data and Volunteer Evaluations.....	356
Creating a Bio Bit or Brief.....	358
Viewing Volunteer History.....	358
Pages Used to Review Volunteer History.....	358
Reviewing Volunteer Involvement.....	358
Viewing Volunteer Audience History.....	359

Chapter 20

Managing Event Initiatives.....	361
Understanding Event Initiative Management.....	361
Prerequisites.....	362

Managing General Initiative Information.....	362
Preparing for Initiative Letters.....	362
Setting Intermediate Goals for Events.....	362
Page Used to Set Intermediate Event Goals.....	363
Using the Event Goals Page.....	363
Creating Events.....	364
Assigning Meeting Details.....	364
Tracking Event Attendance.....	364
Creating Event Templates.....	365
Reviewing Events, Meetings, and Attendees.....	365
Viewing Your To Do List.....	366

Chapter 21

Managing Other Initiatives.....	367
Understanding Other Initiatives.....	367
Prerequisites.....	367
Managing General Initiative Information.....	368
Preparing for Initiative Letters.....	368
Setting Intermediate Goals.....	368
Page Used to Set Intermediate Goals for Other Initiatives.....	368
Using the Other Initiative Goals Page.....	368
Viewing Your To Do List.....	369

Chapter 22

Entering Commitments.....	371
Understanding the Gift and Pledge Process.....	371
Common Elements Used in This Chapter.....	372
Creating and Working With Sessions.....	373
Managing Sessions.....	373
Pages Used to Manage Sessions.....	374
Initializing and Balancing the Session.....	374
Selecting Session Defaults.....	377
Viewing Session Details and Selecting Transactions to Edit or Delete.....	378
Entering Gift and Pledge Payments.....	379
Understanding Gifts and Pledge Payments.....	380
Pages Used to Enter Gifts and Pledge Payments.....	381
Entering a Gift Transaction.....	381
Entering Check or Credit Card Information.....	386

Entering Tribute Notifications.....	388
Identifying Potential Matching Gifts.....	389
Applying Matching Gifts.....	390
Receiving a Scheduled Pledge.....	390
Updating or Adding a Constituent Who Is a Person.....	391
Updating or Adding a Constituent Who Is an Organization.....	392
Loading Mass Gift and Pledge Transactions.....	394
Page Used to Load Transactions.....	394
Loading Gifts and Pledges.....	394
Viewing Gift Session Transactions.....	396
Pages Used to View Gift Session Transactions.....	397
Viewing a Gift Summary.....	398
Viewing Gift Details.....	399
Viewing a Supervisor's Gift Session Summary.....	399
Adjusting Gifts.....	399
Understanding Gift Adjustment.....	399
Page Used to Adjust Gifts.....	400
Selecting a Transaction to Adjust.....	400
Entering a Gift Adjustment Transaction.....	400
Adjusting Gift and Membership Credit Card Payments.....	402
Entering Conditional Pledges.....	404
Understanding Conditional Pledges.....	404
Pages Used to Enter Conditional Pledges.....	405
Entering Conditional Pledge Detail.....	405
Assigning Conditional Pledge Designations.....	406
Assigning Conditional Pledge Recognition.....	408
Entering Pledges.....	409
Understanding Pledges.....	409
Pages Used to Enter Pledges.....	410
Entering a Pledge Transaction.....	410
Determining a Pledge Payment Schedule Within a Session.....	414
Adjusting a Pledge Payment Schedule For a Constituent.....	415
Viewing Pledges.....	416
Pages Used to View Pledges.....	416
Viewing a Pledge Summary.....	418
Viewing Pledge Details.....	418
Viewing a Supervisor's Pledge Summary.....	418
Viewing an Open Pledge Register.....	419
Viewing a Pledge Payment Schedule.....	419
Adjusting Pledges.....	420

Understanding Pledge Adjustment.....	420
Pages Used to Adjust Pledges.....	421
Entering a Pledge Adjustment Transaction.....	421

Chapter 23

Processing Commitments and Analyzing Giving History.....423

Understanding Credit Card Processing.....	424
Accessing the Credit Card Payment Pages.....	424
Common Elements Used in This Chapter.....	425
Queuing Sessions for Posting.....	426
Page Used to Queue Sessions for Posting.....	426
Queuing Balanced Sessions.....	426
Processing and Posting Sessions.....	427
Understanding Session Processing and Posting.....	428
Understanding the GL Interface Process.....	430
Understanding the Constituent Accumulators Process.....	431
Pages Used to Process and Post Sessions.....	433
Running the GL Interface Process.....	433
Running the GL Interface File Extract Process.....	435
Processing Constituent Accumulators.....	435
Viewing a Journal Generator Template.....	436
Processing Credit Card Transactions.....	436
Understanding Credit Card Transaction Processing.....	436
Pages Used to Process Credit Card Transactions.....	440
Selecting Gift and Membership Transactions for Processing.....	440
Authorizing Gift and Membership Transactions.....	441
Settling Gift and Membership Transactions.....	443
Authorizing and Settling Transactions as a Single Process.....	444
Working With Denied Credit Card Transactions.....	444
Understanding Denied Credit Card Transactions.....	444
Pages Used to Work With Denied Credit Card Transactions.....	445
Selecting Denied Gift and Membership Transactions for Processing.....	445
Authorizing and Settling Denied Gift and Membership Transactions.....	446
Reviewing Credit Card Activity.....	447
Pages Used to Review Credit Card Activity.....	447
Selecting Gift and Membership Transactions for Review.....	447
Reviewing Gift and Membership Transactions.....	448
Viewing Accounting Lines.....	449
Page Used to View Accounting Lines.....	450

Viewing Generated Accounting Lines.....	450
Viewing Suspended Sessions.....	451
Page Used to View Suspended Sessions.....	451
Viewing Suspended Session Information.....	451
Viewing Information About and Transferring Sessions.....	454
Pages Used to View and Transfer Session Information.....	454
Filtering Sessions.....	454
Viewing a Session Summary.....	456
Transferring Sessions.....	457
Re-Opening and Editing Expected Counts and Amounts for Sessions.....	457
Managing the Acknowledgement Process.....	458
Understanding How the Acknowledgement Generation Process Works.....	459
Understanding Joint Acknowledgements and Spousal Relationships.....	460
Processing Acknowledgement Letters.....	461
Page Used to Process Acknowledgement Letters.....	462
Processing Acknowledgements Automatically.....	462
Generating Acknowledgement Letters.....	462
Working With Manually Generated Acknowledgements.....	463
Pages Used to Work With Manually Generated Acknowledgements.....	463
Viewing Acknowledgements in Suspense.....	463
Viewing Acknowledgement Details.....	464
Transferring an Acknowledgement.....	466
Viewing Acknowledgement Lists.....	466
Managing Joint Communications.....	467
Handling Matching Gifts.....	468
Understanding Matching Gifts.....	468
Understanding Matching Gift Processing and Foreign Currencies.....	469
Pages Used to Handle Matching Gifts.....	470
Viewing an Organization's Matching Gift Rules.....	472
Viewing an Organization's Matching Gift Restrictions.....	473
Viewing Outstanding Matching Gifts.....	474
Viewing Expected Matching Gifts.....	475
Viewing Matching Gifts for People.....	475
Viewing Matching Gifts for an Organization.....	476
Managing Giving Clubs.....	476
Understanding Giving Clubs.....	477
Pages Used to Manage Giving Clubs.....	477
Manually Generating Giving Club Membership.....	479
Automatically Processing Giving Club Membership.....	480
Tracking Giving Club Progress.....	481

Viewing a Giving Club Summary.....	482
Viewing a Giving Club Membership Summary.....	482
Generating CAE Reports.....	483
Page Used to Generate CAE Reports.....	483
Running a CAE Report.....	484
Analyzing Giving History.....	484
Common Elements Used in This Section.....	485
Pages Used to Analyze Giving History.....	486
Viewing a Donor's Giving Profile.....	490
Viewing an Organization's Giving Profile.....	492
Viewing a Donor's Commitment Summary.....	495
Viewing Commitment Summary Details.....	496
Filtering Donor Commitment Registers.....	497
Viewing Donor Commitment Registers.....	497
Filtering Donor Transaction Registers.....	498
Viewing Donor Transaction Registers.....	500
Comparing Profiles In a Workset.....	500
Viewing Information About Designations.....	501
Generating Designation Donor Reports.....	501
Page Used to Generate Designation Donor Reports.....	502
Running a Designation Donor List Report.....	502

Chapter 24

Interfacing with PeopleSoft Financials 8.4.....	505
Understanding the Interface.....	505
Understanding Messaging.....	506
Setting Up Integration with PeopleSoft Financials 8.4.....	507
Pages Used to Set Up Integration.....	508
Identifying Financials Software Version.....	508
Defining Batch Publish Rules.....	508
Defining Batch Programs.....	509
Setting Up Business Unit Synchronization.....	510
Synchronizing PeopleSoft Contributor Relations Business Unit Data With PeopleSoft Financials.....	511
Publishing Accounting Line Information Automatically.....	512
Page Used to Publish Accounting Lines Automatically.....	513
Running the AVPOST2 Job.....	513
Publishing Accounting Line Information Manually.....	514
Pages Used to Publish Accounting Lines Manually.....	515

Entering AVPACCTL Parameters.....	515
Running the EOP_PUBLISHM Process.....	515
Monitoring Message Results and Status.....	516
Viewing Accounting Lines.....	517
Troubleshooting the Interface.....	517
Correcting Integration Setup Errors.....	517
Correcting Message Channel Errors.....	518
Correcting Messaging Errors.....	518

Chapter 25

Managing Involvement and Self-Service Credit Card Transactions.....	521
Understanding Involvement.....	521
Understanding the Self-Service Online Giving Life Cycle.....	522
Understanding Self-Service Online Pledges.....	522
Accessing Involvement.....	523
Page Used to Access the Involvement Home Page.....	523
Working With the Involvement Home Page.....	523
Giving Online to the Institution.....	524
Understanding Secure Online Giving.....	524
Prerequisites.....	524
Pages Used to Give Online.....	526
Choosing an Organization.....	526
Choosing a Way to Give.....	527
Starting the Online Giving Process.....	527
Entering Gift Information.....	527
Entering Payment Information.....	528
Confirming and Submitting Payment Information.....	528
Viewing Fund Information.....	528
Viewing Payment Results.....	528
Choosing an Existing Campaign.....	529
Donating to an Existing Campaign.....	529
Giving by Mail.....	529
Making a Pledge Online.....	529
Pages Used to Enter Self-Service Online Pledges.....	530
Choosing a Way to Give.....	531
Investing in an Existing Campaign.....	531
Making a Pledge Online.....	531
Entering Pledge Information.....	531
Entering Payment Information.....	531

Confirming and Submitting a Pledge.....	532
Monitoring Self-Service Commitment Summary.....	532
Pages Used to Monitor Self-Service Commitment Summary.....	532
Using the Commitment Summary Page.....	532
Monitoring Self-Service Giving Club Progress.....	533
Page Used to Monitor Self-Service Giving Club Progress.....	533
Monitoring Self-Service Membership History.....	533
Page Used to View Self-Service Membership History.....	533
Generating Self-Service Gift Sessions.....	533
Prerequisites.....	533
Page Used to Generate Self-Service Gift Sessions.....	534
Creating Self Service Gift and Pledge Sessions.....	534
Balancing, Queuing, and Posting Self-Service Gift Sessions.....	534
Processing Self-Service Credit Card Transactions.....	535
Understanding Self-Service Transaction Types.....	535
Prerequisites.....	535
Pages Used to Process Self-Service Credit Card Transactions.....	536
Selecting Self-Service Gift Transactions for Processing.....	536
Settling Self-Service Gift Transactions.....	537
Working With Denied Self-Service Transactions.....	538
Pages Used to Work With Denied Self-Service Transactions.....	539
Selecting Denied Self-Service Gift Transactions for Processing.....	539
Settling Denied Self-Service Gift Transactions.....	540
Adjusting Self-Service Gift Credit Card Payments.....	540
Investigating Self-Service Gift and Pledge Transactions.....	541
Prerequisites.....	541
Pages Used to Investigate Self-Service Gift and Pledge Transactions.....	542
Filtering for Self-Service Gifts.....	542
Viewing Self-Service Gift or Pledge Information.....	543
Viewing Self-Service Gift or Pledge Details.....	544
Viewing Self-Service Gift Log Details.....	544
Selecting Self-Service Gift Transactions for Review.....	544
Reviewing Self-Service Gift Transactions.....	545

Chapter 26

Working With Self-Service Outreach.....	547
Understanding Outreach for Fundraising.....	547
Prerequisites for Fundraising Role.....	548
Initializing and Maintaining the My Prospects Workset.....	548

Page Used to Initialize and Maintain the My Prospects Workset.....	549
Running the AV_WS_MYPROS Process.....	549
Assigning Resources to the My Prospects Workset.....	550
Accessing Outreach Fundraising Functionality.....	551
Page Used to Access Outreach Fundraising Functionality.....	551
Working With the Outreach Home Page.....	551
Managing An Action Plan.....	551
Pages Used to Manage Action Plans.....	552
Reviewing Reminders.....	552
Viewing Assigned Actions.....	552
Managing Prospect Strategies.....	553
Pages Used to Manage Prospect Strategies.....	554
Selecting a Prospect Name.....	554
Editing or Adding a Prospect Strategy.....	555
Editing or Adding Prospect Strategy Details.....	555
Linking a Prospect Strategy With Initiatives.....	556
Linking a Prospect Strategy With Actions.....	556
Viewing a Prospect Strategy Summary.....	556
Managing Prospect Actions.....	557
Pages Used to Manage Prospect Actions.....	557
Selecting a Prospect Name Prior to Managing Prospect Actions.....	559
Editing or Adding a Prospect Action.....	559
Editing or Adding Prospect Action Details.....	559
Editing or Adding Ask Information.....	560
Editing or Adding Prospect Action Descriptions.....	560
Assigning Resources to Prospect Actions.....	560
Linking Prospect Actions to Initiatives.....	560
Viewing a Prospect Action Summary.....	560
Selecting a Prospect Name Prior to Completing an Action.....	561
Selecting an Action to Complete.....	561
Completing a Prospect Action.....	561
Selecting a Prospect Name Prior to Completing a Contact Report.....	562
Entering Contact Report Details.....	562
Viewing a Contact Report Summary.....	563
Sending a Contact Report.....	563
Sending Updated Biographic Information.....	563
Analyzing Prospect Information.....	564
Understanding Outreach for Recruiting and Admissions.....	568
Prerequisites for Recruiting and Admissions Role.....	568
Accessing Outreach Recruiting and Admissions Functionality.....	568

Page Used to Access Outreach Recruiting and Admissions Functionality.....	568
Viewing Prospects.....	568
Pages Used to View Prospects.....	569
Using the Prospects by Category – Select Search Criteria Page.....	569
Using the Prospects by Organization – Select Search Criteria Page.....	570
Using the Prospects by Region – Select Search Criteria Page.....	570
Viewing Applicants.....	570
Pages Used to View Applicants.....	571
Using the Applicants by Category – Select Search Criteria Page.....	572
Using the Applicants by Category – Program Detail Page.....	572
Using the Applicants by Category – Application Status Page.....	572
Using the Applicants by Organization – Select Search Criteria Page.....	572
Using the Applicants by Region – Select Search Criteria Page.....	572

Appendix A

PeopleSoft Contributor Relations Reports.....	573
PeopleSoft Contributor Relations Reports: A to Z.....	573
PeopleSoft Contributor Relations Reports: Selected Reports.....	575

Glossary of PeopleSoft Terms.....	585
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Index	597
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About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications*.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection Website, access the PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection Website, <http://www.peoplesoft.com/corp/en/login.asp>

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>O</i> , not the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
Monospace font	Indicates a PeopleCode program or other code example.
(quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (GER) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading See Also or on a separate line preceded by the word <i>See</i> . Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Once, Always, and Don't Run	<p>Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.</p> <p>Select Always to run the request every time the batch process runs.</p> <p>Select Don't Run to ignore the request when the batch process runs.</p>

Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Contributor Relations Preface

This preface discusses:

- PeopleSoft application fundamentals.
- Common elements in this PeopleBook.

Important! This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

PeopleSoft Application Fundamentals

The *PeopleSoft 8 SP1 Contributor Relations PeopleBook* provides implementation and processing information for your PeopleSoft Contributor Relations Solutions system. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the Student Administration Solutions and Contributor Relations Solutions product lines. Whether you are implementing only PeopleSoft Contributor Relations Solutions, some combination of applications within the product line, or the entire PeopleSoft Student Administration Solutions and Contributor Relations system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

In addition to the *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, you should review the *PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook*. This book provides an overview of the PeopleSoft Campus Community setup tables, and describes many features that are basic building blocks for both PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions.

Note. One or more pages in PeopleSoft Contributor Relations operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “PeopleSoft Campus Community Preface”

Common Elements Used in This PeopleBook

Start Date and End Date	Enter a Start Date and End Date for the action, campaign, initiative, role assignment, and so on. When you click the prompt button for this field, the pop-up calendar displays. Use the arrow keys at the bottom of the calendar to locate the appropriate month and year, then click the specific date. The start date populates by default to today's date, but can be overridden.
Person/Org	Select either <i>Person</i> or <i>Organization</i> to determine the group you want to work with or view information about.
Currency Code	Select a currency code for the values you enter on a page, which may differ from your institution's or business unit's default currency.
Amount/Pct/Total (amount/percent/total)	This field's format changes depending on whether you are tracking percentages, amounts, or total numbers. Enter the appropriate amount.
Time Frame	Select <i>Current</i> , <i>Historical</i> or <i>All</i> to determine the time frame for which you want to view information. If you select <i>All</i> , current records display as well as those for which the end date has passed.
Cnst Type (constituent type)	View the relationships a constituent has with your institution, such as <i>Alumni</i> , <i>Friend</i> , <i>Parent</i> , <i>Faculty</i> , <i>Staff</i> , and so on. These values are shipped with your system in the Constituent Type table and should not be altered.

CHAPTER 1

Getting Started With PeopleSoft Contributor Relations Solutions

This chapter provides an overview of PeopleSoft Contributor Relations business processes and discusses PeopleSoft Contributor Relations Solutions implementation.

PeopleSoft Contributor Relations Business Processes

This PeopleBook reviews the concepts behind PeopleSoft Contributor Relations business processes and presents procedures for setting up and using this part of your PeopleSoft Student Administration Solutions system.

The following topics provide an overview of this PeopleBook:

- The chapter “Setting Up Your PeopleSoft Contributor Relations Framework” discusses the initial steps you must take to set up your PeopleSoft Contributor Relations system.
- The chapter “General Functions Used Throughout the System” discusses how to use the Spouse link, work with worksets, and create service indicators.
- The chapters on setting up and maintaining constituent data discuss tracking of biographic and demographic information about your constituents.
- The chapters on setting up and managing prospects and planned giving prospects discuss maintaining prospect information, creating comprehensive strategic and cultivation activity plans, and monitoring those plans.
- The chapters on setting up and managing campaigns discuss strategic planning, implementation, and analysis of specific fundraising efforts.
- The chapters on setting up and managing membership initiatives discuss creating, managing, and evaluating organizational membership programs.
- The chapters on setting up and managing volunteer efforts discuss monitoring, managing, and evaluating organizational volunteer activity.
- The chapters on setting up and managing event initiatives discuss planning, implementing, and analyzing event initiatives of various proportions and goals.
- The chapters on setting up and managing other initiatives discuss the process of maintaining initiatives that do not fall into the category of campaign, event, membership initiative, or volunteer drive.
- The chapters on setting up commitment management and entering commitments discuss recording gifts, pledges, and membership payments by constituents.
- The chapter “Processing Commitments and Analyzing Giving History” discusses tracking and acknowledging all types of commitments made by constituents. This section also discusses the analysis of donors’ giving.

- The chapter “Interfacing With PeopleSoft Financials 8.4” discusses GL interface functionality that exists for customers who use PeopleSoft Financials 8.4 to process their financial transactions.
- The chapter “Managing Involvement and Self-Service Credit Card Transactions” discusses the particular processes involved with processing gift payments made by credit card and through online giving sessions.
- The chapter “Working With Self-Service Outreach” discusses the particular tools used by outreach officers and recruiting officers.
- The chapter “PeopleSoft Contributor Relations Reports” discusses all the reports contained in PeopleSoft Contributor Relations Solutions.

PeopleSoft Contributor Relations Solutions Implementation

The next chapter, *Setting Up Your PeopleSoft Contributor Relations Framework*, discusses initial tasks you should complete as part of setting up a fundraising system at your institution. In addition, each setup chapter lists prerequisite questions to consider before implementing each business process, including self-service functionality.

In the planning phases of your implementation, take advantage of all PeopleSoft sources of information, including installation guides and table-loading sequences.

CHAPTER 2

Setting Up Your PeopleSoft Contributor Relations Framework

This chapter provides the initial steps to set up your PeopleSoft Contributor Relations system and discusses how to:

- Complete Contributor Relations (CR) installation.
- Define user defaults.
- Set up institution defaults.
- Set up institution table security.
- Define and secure Contributor Relations business units and setIDs.
- Add resources.

Completing CR Installation

This section discusses how to complete PeopleSoft Contributor Relations installation.

Page Used to Complete CR Installation

Page Name	Object Name	Navigation	Usage
CR Installation (Contributor Relations installation)	AV_INSTALLATION	Design Student Administration, Define Contributor Relations, Setup, Contributor Relations, CR Installation	Define system-wide business rules for many functional areas within your Contributor Relations system. In addition, specify the most recently used numbers for things such as strategies, assets, ratings, actions, gifts, and sessions to eliminate problems with duplicate data once your conversion is complete.

Using the CR Installation Page

Access the CR Installation Page.

CR Installation																	
Assignment Role Option <input type="radio"/> Defined <input checked="" type="radio"/> Class <input type="radio"/> All																	
Spouse Recognition Split <table border="1"> <thead> <tr> <th></th> <th>Credit Type</th> <th>Percent</th> </tr> </thead> <tbody> <tr> <td>Donor Record:</td> <td>Hard Credit</td> <td>100.00</td> </tr> <tr> <td>Donor Record 2:</td> <td></td> <td></td> </tr> <tr> <td>Spouse Record:</td> <td>Soft Credit</td> <td>100.00</td> </tr> <tr> <td>Spouse Record 2:</td> <td></td> <td></td> </tr> </tbody> </table>				Credit Type	Percent	Donor Record:	Hard Credit	100.00	Donor Record 2:			Spouse Record:	Soft Credit	100.00	Spouse Record 2:		
	Credit Type	Percent															
Donor Record:	Hard Credit	100.00															
Donor Record 2:																	
Spouse Record:	Soft Credit	100.00															
Spouse Record 2:																	
Default Soft Credit Type: <input type="text" value="Soft Credit"/>																	
Payment Schedule: <input type="text" value="S-Annual"/>																	
Allow Feedable Pledges: <input checked="" type="checkbox"/>																	
Allow Pledge Payment Override: <input checked="" type="checkbox"/>																	
Require Contact Report: <input checked="" type="checkbox"/>																	
Financials Release <input type="text" value="8.4"/>																	
Strategy Number:	<input type="text" value="5"/>																
Asset Number:	<input type="text" value="8"/>																
Rating Number:	<input type="text" value="14"/>																
Action Number:	<input type="text" value="99"/>																
Initiative Action Number:	<input type="text" value="46"/>																
Gift Number:	<input type="text" value="305"/>																
Session Number:	<input type="text" value="160"/>																
Relation Number:	<input type="text" value="49"/>																
Planned Giving Number:	<input type="text" value="6"/>																
Volunteer Group:	<input type="text" value="9"/>																
Volunteer Structure Number:	<input type="text" value="15"/>																
Membership Number:	<input type="text" value="53"/>																
Member Payment Number:	<input type="text" value="53"/>																
Last Receipt Number:	<input type="text" value="3"/>																
Last Reference Number:	<input type="text" value="3"/>																

CR Installation page

Assignment Role Option

Use this group box to determine how roles are made available in fields throughout the system.

Defined

Select this option if resources can only be assigned with the roles you select for them on the Staff Roles, Unit Roles, or Volunteer Roles pages.

For example, if staff member Darla Perkins is a Prospect Manager, you must first define Prospect Manager as a staff role, then select that role for Darla Perkins on the Staff Roles Page. Then, if this is her only defined role, whenever Darla Perkins is selected, only the Prospect Manager appears as an available option.

Class

Select this option if all the roles defined for a resource type are available to every person or Contributor Relations business unit that is part of that resource type.

For example, if you define the role of Prospect Manager and select the Staff check box on the Define Roles page, then all the staff members at your institution can be assigned as Prospect Managers, regardless of whether they have been assigned that role.

All

Select this option if any resource at your institution (whether staff, unit or volunteer) can be assigned for any defined role. Using this option, it is possible to assign a business unit as a Prospect Manager. There are no restrictions in place to prevent you from doing so.

See [Chapter 2, “Setting Up Your PeopleSoft Contributor Relations Framework,” Defining Roles, page 31.](#)

Spouse Recognition Split

Use the Spouse Recognition Split group box to set up the default hard and soft credit splits that occur when a person gives a gift and credits his or her spouse. These values are used to calculate spouse recognition on the Recognition page when a donor with a spouse’s gift is entered, but can be overwritten.

Donor Record	Select a credit type and the percent of the gift to allocate to that credit type as a default for the donor making the commitment.
Donor Record 2	(Optional) Select a credit type and the percent of the gift to allocate to that credit type as a default.
Spouse Record	Select a credit type and the percent of the gift to allocate to that credit type as a default for the spouse’s recognition.
Spouse Record 2	(Optional) Select a credit type and the percent of the gift to allocate to that credit type as a default.

Note. There are two rows of donor recognition defaults and two rows of Spouse Recognition defaults so you can set up both a hard credit and soft credit recognition default for each person. The total percentage of hard credit types between the donor record and the spouse record must equal 100%.

Setting the Default Soft Credit Type, Payment Schedule, Pledge Feed, and Pledge Payment Override

You can determine the default type of soft credit recognition to appear in the Soft Credit field when entering gift and pledge recognition information. Soft credits are defined by your institution.

Default Soft Credit Type	Select the soft credit type to appear by default in the Soft Credit field when entering gift and pledge recognition information. This default can be overwritten. The valid soft credits at your institution display in this prompt box. Hard is a delivered credit type. All other credit types are considered soft credit.
Payment Schedule	Select the payment schedule to display as the default in the Payment Schedule field on the Pledge Detail page when entering a pledge. This default can be overridden. Field values are delivered with your system as translate values. Do not modify these values in any way. Any modifications to these values require a substantial programming effort.
Allow Feedable Pledges	Select this check box for the ability to send pledges to the financial system for recording as a receivable. This is not an automatic process. Selecting this check box activates the Feed Pledge check box on the Gift Entry and Adjust Gift Entry pages. The decision to feed a particular pledge occurs when entering each transaction individually. Only pledges with the Feed Pledge check box selected are included in the AV_ACCTG_LN record created through the GL Interface process.

Allow Pldg Pmt Detail Override (allow pledge payment detail override)	Select this check box to allow data entry staff to change recognition or designation information for a pledge at the time of pledge payment.
--	--

Important! Pledge payment overrides can only be made if the pledge has not been fed to your financial system.

Determining Whether Contact Reports are Required

You can determine whether contact reports are required for each completed action in your system.

Required Contact Report	Select the Required Contact Report check box if contact reports are required for each completed action at your institution. When you select this check box, you are required to write a contact report before saving an action as <i>Completed</i> .
--------------------------------	--

Identifying Financial Software Version

Identify the version of financial software in use at your institution, whether from PeopleSoft or a third-party vendor.

Your selection determines which “path” the PeopleSoft Contributor Relations system will use to transfer accounting line information. The values *7.5* and *Other* trigger a flat-file approach, in which the system creates a flat file that can be picked up and used both by older versions of PeopleSoft Financials and by an external financial application. The value *8.4* triggers an integrated messaging interface.

See [Chapter 24, “Interfacing with PeopleSoft Financials 8.4,” page 505](#).

Setting Last Record Numbers

You can enter the last record number assigned to items such as strategies, actions, gifts, and so on. When you create new records in your system, they are numbered consecutively beginning with the number after the one you enter here. As new records are added, the last record numbers on this page increase so you always know the number of the last record entered.

Important! Once you have set these numbers, PeopleSoft recommends that you never roll it back, or decrease it. However, you can increase these numbers.

Enter the last Strategy Nbr, assigned to the most recent prospect strategy.

Enter the last Asset Nbr, assigned to the most recent personal asset.

Enter the last Rating Nbr, assigned to the most recent prospect rating.

Enter the last Action Nbr, assigned to the most recent constituent action.

Enter the last IntvAction Nbr, assigned to the most recent initiative action.

Enter the last Gift Number, assigned to the most recent commitment.

Enter the last Session Nbr, assigned to the most recent session.

Enter the last Relation Nbr, assigned to the most recent organization relationship record.

Enter the last PGiving Nbr, assigned to the most recent planned gift.

Enter the last Vol Grp Nbr, assigned to the most recent volunteer group.

Enter the last Vol Strct Nbr, assigned to the most recent volunteer structure.

Enter the last Mbr Nbr, assigned to the most recent membership in a member organization.

Enter the last Member Pmt Nbr, assigned to the most recent membership dues payment.

Defining User Defaults

This section discusses how to:

- Set operator defaults.
- Select profile/compare columns settings.
- Select custom bio bit/brief setup settings.

Pages Used to Define User Defaults

Page Name	Object Name	Navigation	Usage
Operator Defaults	AV_OPR_DEF1	Design Student Administration, Define Contributor Relations, Setup, Operator Defaults, Operator Defaults	Select default system values based on the user ID.
Profile Compare Columns	AV_PROF_CMP_DEF_SP	Click the Profile Compare Columns button on the User Defaults page.	Set up the default columns that display in the grid box on the Profile Compare page.
Custom Bio Bit/Brief Setup	AV_BIO_CUST_SP	Click the Bio Bit/Brief button on the User Defaults page.	Set up the default items included in customized bio bit and brief reports that you generate. You can create a name for your default report and specify which items are included. The reports you define here appear as available options in the Custom field on the Biographic Profile page.

Setting Operator Defaults

Access the Operator Defaults page.

Operator Defaults

User ID: PS Carroll, Bruce

Academic Institution: PSUNV PeopleSoft University

Business Unit: MEDBU Medical Business Unit

SetID: MODEL Model Business Rules

☒ **Auto Load Registers**

Profile Compare Columns

Bio Bit/Brief

Des BU	Designation	Initiative Code	Appeal Code
1 LAWBU	LAW SCHOOL	LAW SCHOOL	LAWBLDG
2 MEDBU	MEDICALBLDG	MED BLDG	ANNUAL
3 PSUNV	ANNUALFUND	ANNFUND	ANNUAL

Person Profile

Profile View: Biographic

Phone Type: Home

Address Type: Home

Email Type: Home

Operator Defaults page

Academic Institution

Select the default academic institution for the current user. This academic institution defaults on all pages where institution is required, but can be overridden. The full name of the academic institution you select displays to the right of this field.

Business Unit

Select the default business unit for the current user. This business unit defaults on all pages where business unit is required, but can be overridden. The full name of the business unit you select displays to the right of this field.

SetID

Select the default setID for the current user. This setID defaults on all entry pages where setID is required, but can be overridden. The full name of the setID you select displays to the right of this field.

Auto Load Registers

Select this check box to automatically load data with the defaults the user selects on this page when you access the Commitment Register and Transaction Register pages.

Profile Compare Columns

Click to set up the default columns that display in the grid box on the Profile Compare page. The Select Profile Compare Columns page displays. You can set default columns here but you also have the option of changing the columns on a temporary basis from the Profile Compare page as well.

Bio-Bit/Brief

Click to set up the default items included in customized bio bit and brief reports that you generate. You can create a name for your default report and

specify which items are included. The reports you define here appear as available options in the Custom field on the Biographic Profile pages.

Des BU (designation business unit)

Select the default designation business unit to appear when entering gift or pledge transactions in the system. The designation business unit is the default business unit to which commitments are allocated. These defaults can be overridden by the selections you make on the Session Defaults page within a session and within the entry page.

Designation

Select the default designation to appear when entering gift or pledge transactions in the system. The designation is the default designation to which commitments are allocated. These defaults can be overridden by the selections you make on the Session Defaults page within a session and within the entry page.

Initiative Code

Select the default initiative code to appear on the Designation page when entering gift or pledge transactions in the system. These defaults can be overridden by the selections you make on the Session Defaults page within a session.

Appeal Code

Select the default appeal code to appear on the Designation page when entering gift or pledge transactions in the system. These defaults can be overridden by the selections you make on the Session Defaults page within a session.

Person Profile

The values you select here determine a user's default views of information on the Person Profile page.

Profile View

Select which profile view—*Biographic*, *Commitment*, or *Participation*—should appear.

Address Type

Select which address type should appear.

Phone Type

Select which phone type should appear.

Email Type

Select which email type should appear.

Selecting Profile/Compare Columns Settings

Select the check box next to each field you want to display as a default column on the Profile Compare page.

Selecting Custom Bio Bit/Brief Setup Settings

Access the Custom Bio Bit/Brief Setup page.

Custom Bio Bit/Brief Setup

Bio Bit/Brief View All First 1 of 1 Last

Report Name: Development Officer Rept + -

<input checked="" type="checkbox"/> Alias Names	<input checked="" type="checkbox"/> Involvement	<input checked="" type="checkbox"/> Summary
<input checked="" type="checkbox"/> Srv. Indicator	<input checked="" type="checkbox"/> Planned Giving	<input checked="" type="checkbox"/> Narrative
<input checked="" type="checkbox"/> Roles	<input checked="" type="checkbox"/> Assets	<input checked="" type="checkbox"/> Assigned Staff
<input checked="" type="checkbox"/> Addr. & Tel.	<input checked="" type="checkbox"/> Ratings	<input checked="" type="checkbox"/> Assigned. Vol.
<input checked="" type="checkbox"/> Personal Data	<input checked="" type="checkbox"/> Spouse Info.	<input checked="" type="checkbox"/> Assigned Units
<input checked="" type="checkbox"/> Academic Info.	<input checked="" type="checkbox"/> Family Info.	
<input checked="" type="checkbox"/> Employment Info	<input checked="" type="checkbox"/> Other Relation	
<input checked="" type="checkbox"/> Giving to Univ.	<input checked="" type="checkbox"/> Org. Relations	
<input checked="" type="checkbox"/> Five Lrg. Gft.	<input checked="" type="checkbox"/> Legacy Acad.	

OK Cancel

Custom Bio Bit/Brief Setup page

Enter the name of your default report in the Report Name field.

Select the check box next to each item you want to include in the report.

Relationship Information is broken down by the following selections:

Item	Includes these Relationship Types
Spouse Info.	Spouse
Family Info.	Brother, Daughter, Father, Grandfather, Other Relation, Son, Step-Father Sister, Self, Step Mother
Other Relation	Employee, Employer, Friend, Ln Co-Makr, Ln-Refernc, Ln Co-Sign, Neighbor, None Indi, Other, Partner, Roommate, Works for

Setting Up Institution Defaults

Use the Institution Installation and Institution Installation 2 pages to define default values used throughout your institution. The defaults you set on these pages are used throughout the system.

This section discusses how to:

- Set institution default values.

- Set up the Bio Bit and Bio Brief reports.
- Set further institution default values.

Pages Used to Set Up Institution Defaults

Page Name	Object Name	Navigation	Usage
Institution Installation	AV_INSTALL_INST	Design Student Administration, Define Contributor Relations, Setup, Institution Defaults, Institution Installation	Begin the process of setting institution default values used throughout the system.
Bio Bit Setup	AV_BIO_BIT_SP	Click the Bio Bit button on the Institution Installation page.	Select the attributes to include in the standard bio bit report generated by your institution.
Bio Brief Setup	AV_BIO_BIT_SP	Click the Bio Brief button on the Institution Installation page.	Select the attributes to include in the standard bio brief report generated by your institution.
Institution Installation 2	AV_INSTALL_INST2	Design Student Administration, Define Contributor Relations, Setup, Institution Defaults, Institution Installation 2	Set up acknowledgement and receipt defaults for your institution.

Setting Institution Default Values

Access the Institution Installation page.

Institution Installation
Institution Installation 2

Institution: PSUNV PeopleSoft University

Distribute Overpayment

☒ Next Payment
☐ Equally
☐ Ignore

Distribute Underpayment

☒ Next Payment
☐ Equally

Financials Link

SetID: MODEL
Calendar ID: 01
Clearing Account: 000001000055

Membership

Allow Gifts in Membership ☒
Membership Days: 60

Maximum Retrieval: 9999

Bio Bit
Bio Brief

Alumni Member Organization

Member Organization Code: ALUMASSN Alumni Association

Institution Installation page

Distribute Overpayment

Use this group box to determine how pledge overpayments are distributed.

Next Payment	Select this option to deduce the amount of the overpayment from the next scheduled pledge payment.
Equally	Select this option to evenly distribute the overpayment distributed throughout all remaining pledge payments
Ignore	Select this option to not adjust for the overpayment.

Distribute Underpayment

Select the appropriate option from this group box to determine how pledge underpayments are distributed.

Next Payment	Select this option to add the amount of the underpayment to the next scheduled pledge payment.
Equally	Select this option to evenly add the underpayment throughout all remaining pledge payments.

Financial Link

SetID	This default setID appears by default in fields throughout the system when your institution's default setID is the field default.
Calendar ID	Select the default ID for the institutional calendar that determines the fiscal year.
Clearing House	Enter the default clearing account to be used when processing membership and gift transactions. The clearing account holds refunds for donors. The prompt box for this field contains all the valid item types you can use for a clearing account. Clearing accounts must have a journal set of 0 with an indicator of "credit." When a refund is issued, this clearing account is debited and the tender account is credited.

Membership

Allow Gifts in Membership	Enables you to enter additional gifts through the Membership Entry page.
Membership Days	<p>Enables you to enter the number of days before a membership period ends that dues payments fall into the next membership period.</p> <p>For example, a member organization resets membership every June 1. You set the Membership Days field to 31 days. Any dues payments for that membership organization after May 1 are credited toward the next membership period.</p>

Other Page Elements

Maximum Retrieval	Enter the maximum number of records that the system retrieves on the involvement roster at once. If this number is exceeded, a warning message displays telling the user that additional records exist and cannot be retrieved.
--------------------------	---

- Bio Bit** Click to access the Bio Bit Setup page. Using this page, select the attributes to include in the standard bio bit report.
- Bio Brief** Click to access the Bio Brief Setup page. Using this page, select the attributes to include in the standard bio brief report.

Alumni Member Organization

- Member Organization Code** Membership in this organization sets the member flag on the Person Profile page.

Setting up the Bio Bit and Bio Brief Reports

Select the check boxes next to the attributes to include in the standard bio brief report. The report that you define here prints when a you select a Bio Brief on the Biographic Profile page rather than selecting a customized report.

See Also

[Chapter 2, “Setting Up Your PeopleSoft Contributor Relations Framework,” Selecting Custom Bio Bit/Brief Setup Settings, page 9](#)

[Appendix A, “PeopleSoft Contributor Relations Reports,” PeopleSoft Contributor Relations Reports: Selected Reports, page 575](#)

Setting Further Institution Default Values

Access the Institution Installation 2 page.

Institution Installation **Institution Installation 2**

Institution: PSUNV PeopleSoft University

Receipt

Event ID: AVACK1 🔍

Acknowledgement Priority	
Srvc Ind:	1
Gift:	2
Honor:	3
Memory:	4
Deceased:	5

Acknowledgement
<input type="checkbox"/> Soft Credit
<input type="checkbox"/> Adjusted Gift
<input type="checkbox"/> Adjusted Pledge

Currency Default
*Base Currency: USD 🔍
*Rate Type: OFFIC 🔍

To Do List
Reminder Days: 60

Institution Installation 2 page

Receipt

Event ID Select the event ID containing the letter code for the default receipt your institution will issue.

Acknowledgement Priority

Enter numbers to represent the priority for sending acknowledgement letters. The priority you set determines which acknowledgement setup parameters are looked at first to determine which letter a donor receives. This priority is used in the Acknowledgements COBOL process to produce a single letter for the commitment.

Acknowledgement

Soft Credit Select to send acknowledgement letters for soft credit. The system sends acknowledgement letters to donors with only soft credit on a gift based on the rules set up on the Acknowledgement Setup pages. If a donor has hard credit on a gift, no soft credit acknowledgement and no receipt is produced.

Adjusted Gift Select to send acknowledgement letters for adjusted gifts.

Adjusted Pledge Select to send acknowledgement letters for adjusted pledges.

Note. If a designation has its own acknowledgement defined, a letter acknowledging a gift to that designation is produced as well.

To Do List

Reminder Days Enter the number of days prior to an action's planned date for which the item should appear on the current view of the assigned resource's to do list.

Currency Default

Base Currency Although business units may operate under different default currencies, all calculations performed by the system translate to the institution base currency you select here. To protect your historical data, once you select a value for this field and save the page, you cannot make additional changes.

Rate Type Select the exchange rate to use when translating amounts to the base currency. Examples of rate type are *Official Rate*, *Spot Rate*, and *Free Market Rate*. To protect your historical data, once you select a value for this field and save the page, you cannot make additional changes.

Setting Up Institution Table Security

This section discusses how to set institution table security.

Page Used to Set Up Institution Table Security

Page Name	Object Name	Navigation	Usage
Institution Table Security	SCRTY_TABL_INST	<ul style="list-style-type: none"> Design Student Administration, Define Contributor Relations, Setup, Secure Institution Table, Institution Table Security Design Student Administration, Secure Student Administration, User ID, Academic Institution Security, Academic Institution Security 	Set up security access for users at academic institutions.

Setting Institution Table Security

Access the Institution Table Security page.

Institution Table Security

Academic Institution Security

User ID: ADMIN Carroll, Bruce

*Academic Institution	Access Code
PSUNV <input type="text"/> <input type="button" value="Q"/>	PeopleSoft University Read/Write <input type="button" value="+"/> <input type="button" value="-"/>

Institution Table Security page

Academic Institution

Provide the user with access to the system for that institution. Once selected, the user automatically has read/write access to all the data related to that institution.

If a user is given access to only one institution, that institution defaults on all pages requiring an institution.

Defining and Securing Contributor Relations Business Units and SetIDs

This section discusses how to:

- Create Contributor Relations business units.
- Implement functional group security.
- Define functional group components.

- Choose component search record settings.
- Secure Contributor Relations business units.

Understanding Contributor Relations Business Units and SetIDs

Establishing business unit structure for PeopleSoft Contributor Relations enables you to efficiently secure and segment data. This organizational structure may differ from the structure set up to support other PeopleSoft applications at your institution. You can define business units that reflect the functional needs of your institution, and setIDs for sharing tables with setup values. This structure enables you to define data segmentation based on business rules. In addition query and reporting capabilities become more powerful for your institution and the individual user.

In PeopleSoft Contributor Relations, both the membership and commitment entry portions of the system are secured at the business unit level.

In addition, your system is delivered with a set of defined functional groups that represent the business processes impacted by business units. For each functional group, determine whether or not to implement user level security. If user security is selected for any functional group, establish user access to appropriate business units.

Warning! Before creating and securing business units, think carefully about how to set up your institutional structure and about what information particular users need to access. Once you define a structure, you cannot delete a business unit.





Pages Used to Define and Secure Contributor Relations Business Units and SetIDs

Page Name	Object Name	Navigation	Usage
Business Unit CR (business unit Contributor Relations)	AV_BUS_UNIT_TBL	Design Student Administration, Define Contributor Relations, Setup, Business Unit CR, Business Unit CR	Define the business units at your institution from a cultivation and fundraising perspective.
Functional Group Security	AV_FUNC_GRP_TBL	Design Student Administration, Define Contributor Relations, Setup, Functional Group Security, Functional Group Security	Determine whether to implement user-level business unit security for the various functional groups in the system. Functional groups are delivered with your system as translate values and represent the business processes that use business unit functionality in the system. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.
Component Function	AV_CMPNT_FUNC	Design Student Administration, Define Contributor Relations, Setup, Functional Group Components, Component Function	Identify the components in your system that make up a functional group. The components in a functional group inherit the security settings you define for that group on the Functional Group Security page.
Component Search Records	AV_BU_SCRTY_REC	Click the Srch Recs link on the Component Function page.	View or select search views for components based upon the type of security used when accessing them.
CR Business Unit Security (Contributor Relations business unit security)	AV_SCRTY_BU_TBL	Design Student Administration, Define Contributor Relations, Setup, Secure Business Unit, CR Business Unit Security	Grant a user security access to one or more business units at your institution.

Creating Contributor Relations Business Units

Access the Business Unit CR page.

Business Unit CR

Business Unit:	MEDBU	
*Description:	<input type="text" value="Medical Business Unit"/>	
Short Description:	<input type="text" value="Med-bu"/>	
*Institution:	<input type="text" value="PSUNV"/>	PeopleSoft University
*Base Currency:	<input type="text" value="USD"/> 	US Dollar
*Rate Type:	<input type="text" value="OFFIC"/> 	OFFICIAL
Tender Type:	<input type="text" value="CHK"/> 	
General Ledger Unit:	<input type="text" value="PSUNV"/> 	

Business Unit CR page

Institution	Select the name of the institution to which the business unit belongs. If you have already saved the business unit, this field is display-only. If a business unit is assigned to a different institution, a new business unit CR should be created.
Base Currency	Select the base currency to default when entering transactions or working with financially driven processes within this business unit.
Rate Type	Select the exchange rate to use when translating amounts to the base currency for this business unit. Examples of rate type are <i>Official Rate</i> , <i>Spot Rate</i> , and <i>Free Market Rate</i> .
<div>Note. Transactions entered in the system are translated from the session currency to your institution’s base currency using the rate type on the Institution Defaults page. The business unit base currency setting is used as the default currency code for all membership and gift sessions created, but can be overridden.</div>	
Tender Type	Select the default tender type to use when entering transactions for this business unit. Tender types are defined on the Tender Types page. The tender type is used as the default tender type for all membership and gift sessions created for this business unit, but can be overridden.
General Ledger Unit	Select the business unit at your institution where GL data for this Contributor Relations business unit is stored. Tying data to this general ledger unit enables you to structure Contributor Relations business units differently than other business units at your institution. The business units you define are tied back to the general ledger business units through this field.

Examples

The following scenarios represent two different ways an institution might set up Contributor Relations business units.

PeopleSoft University A is a single campus institution. This institution's business units are organized along individual schools, with some degree of centralization. Its business units include:

- Medical School Business Unit.
- Law School Business Unit.
- PeopleSoft University Business Unit (Centralized Business Unit for all standard schools. For example, School of Arts and Sciences, School of Business, and School of Education)

PeopleSoft University B is a multi-campus institution, and its business units are organized by its various locations. Its business units include:

- Main Campus business unit.
- Extension Campus business unit.
- Online Campus business unit.

Implementing Functional Group Security

Access the Functional Group Security page.

Functional Group Security Level		View All	First	1-4 of 4	Last
*Functional Group:	Gift/Pledge Entry	<input checked="" type="radio"/> None	<input type="radio"/> Operator		
*Functional Group:	Gift/Pledge Inquiry	<input checked="" type="radio"/> None	<input type="radio"/> Operator		
*Functional Group:	Membership Entry	<input checked="" type="radio"/> None	<input type="radio"/> Operator		
*Functional Group:	Membership Inquiry	<input checked="" type="radio"/> None	<input type="radio"/> Operator		

Functional Group Security page

Functional Group

Select a functional group to define security for. Functional groups are delivered with your system and represent the major business processes in the system that are affected by business unit. The functional groups delivered with your system cannot be removed or amended.

Functional Security

Select *None* to not allow the components that make up this functional group to be controlled by user-level business unit security. Select *Operator* to allow this control. If you select *Operator*, the access you grant users on the Secure Business Unit page determine what information a user can access within the functional group.

Refresh Security

If you make changes to the Functional Security selection for any functional group, this button appears. Run the Refresh Security Process to activate any changes made to security settings. The Refresh Security process is an Application Engine program that synchronizes the component search records and prompt edit table values with the setup of the PSSTATUS table. Updating this value ensures that all Application Servers use the latest version. This is not limited to PeopleSoft Contributor Relations; it impacts all PeopleSoft applications sharing the database. When you run this process, check the Process Monitor to verify that it runs successfully and the Message Log for a detailed list of the changes implemented. See the warning in this section prior to running this process.

Warning! After running the Refresh Security process, you must delete all cache files. You must also re-run the PeopleTools process that creates a shared cache file for multiple application servers. This process impacts all applications sharing this database! Contact your IT Support Staff before running this process.

Defining Functional Group Components

Access the Component Function page.

Component Function

Institution: PSUNV PeopleSoft University

AV Component Functional Group Assignment							View All	First	1-7 of 52	Last
	*Component Name	*Functional Group	Security	Srch Recs						
1	AV_ADJ_GIFT	Gift/Pledge Entry	Operator	Srch Recs	+	-				
2	AV_ADJ_MBR	Membership Entry	None	Srch Recs	+	-				
3	AV_ADJ_PLEDGE	Gift/Pledge Entry	Operator	Srch Recs	+	-				
4	AV_BTCH_M_TOT	Membership Entry	None	Srch Recs	+	-				
5	AV_BTCH_PL_TOT	Gift/Pledge Entry	Operator	Srch Recs	+	-				
6	AV_BTCH_TOT	Gift/Pledge Entry	Operator	Srch Recs	+	-				
7	AV_CMTMT_SMRY	Gift/Pledge Inquiry	Operator	Srch Recs	+	-				

Component Function page

Warning! If the security determination process is run on a component that's not assigned to a functional group on this page, the system displays a warning alerting you to the missing setup values, and the component is accessed without business unit security activated. Your system is delivered with all the appropriate components assigned to their respective functional group. Do not make any changes to these settings unless your institution is adding business unit functionality not provided by PeopleSoft Contributor Relations.

Component Name

Select the name to assign to a functional group. Components are groupings of pages. You can select from a list of all the valid components in the system.

Functional Group	Select the name of the functional group to which the component belongs. Functional groups are delivered with your system and represent major business processes in the system.
Security	If you have defined security for the CR functional group you select, the security option appears. Valid security options include <i>Operator</i> or <i>None</i> .
Srch Recs (search records)	Click if user-level security for a component is controlled at the search record level. The Component Search Record Settings page displays.

Choosing Component Search Record Settings

Access the Component Search Record Settings page.

Component Name: AV_BTCH_PL_TOT

Component Search Record Settings						View All	First	1-2 of 2	Last
	*Security Function	*Search View	Add Search View						
1	None	AV_SESS_OP_VW	AV_SESS_ADDP_VW	+	-				
2	Operator	AV_SESS_OP_VW	AV_SESS_APSECWW	+	-				

OK Cancel

Component Search Record Settings page

Warning! Your system is delivered with all the search views assigned to the appropriate components. Do not make any changes to these settings unless your institution is adding business unit functionality not provided by PeopleSoft Contributor Relations.

Security Function	Select <i>None</i> or <i>Operator</i> to determine the type of security for which you are selecting search views.
Search View	Select the search view to associate with the component for the security function you selected. The prompt lists all valid search views.
Add Search View	If a component is configured to allow you to add a new record, and the search view to create a new record is different than the Update/Display search record, specify an add search view. For example, you want <i>NEW</i> in the session number field instead of blank by default.

The following components are secured at the search view level:

Functional Group	Component	Description
Gift/Pledge Entry	AV_BTCH_TOT	Balance Session
	AV_BTCH_PL_TOT	Pledge Balanced Session
	AV_PLDG_SCHD_ADJ	Pledge Schedule Adjustment
	AV_PLDG_SCHD_ADJ_E	Org Pledge Schedule Adjustment
Gift/Pledge Inquiry	AV_PLDG_SCHD_INQ	Pledge Schedule Inquiry
	AV_PLDG_SCHD_INQ_E	Org Pledge Schedule Inquiry
	AV_SPR_GIFT_SMRY	Supervisor Gift Summary
	AV_SPR_PLEDGE_SMRY	Supervisor Pledge Summary
Membership Entry	AV_MEMBERSHIP	Manage Member Organization
	AV_BTCH_M_TOT	Membership Balance Session
Membership Inquiry	AV_SPR_MBRSHIP_SMRY	Supervisor Membership Summary

Securing Contributor Relations Business Units

Access the CR Business Unit Security page.

CR Business Unit Security

User ID: 8052
Avery,Joan

View AllFirst1-2 of 2Last

*Business Unit	Access Code
1 LAWBU Law BU	Read/Write + -
2 MEDBU Medical Business Unit	Read/Write + -

CR Business Unit Security page

Business Unit

Select the business unit for which to grant the user access.

Access Code

Indicates the type of access a user has to a particular business unit. Since security is granted when you add a row to this table, this field displays a value of *Read/Write*.

Understanding Business Units and the Commitment Entry Process

The following process describes how business units work within the commitment entry process. This process assumes that you have already set up your operational structure, including business units and setIDs, and secured them.

To work with business units throughout the commitment entry process:

1. Define setup values for commitment entry. These include defining values for designations, initiatives, and appeals.
2. Set up user defaults for institution, business unit, and setID using the Operator Defaults page. These default values are used throughout the system. In addition, select defaults for designation business units.
3. Open a new gift or pledge session. Each session is associated with a business unit. Within the session, commitments can be designated to one or more business units. Once a session is established, default designation business units, designation, initiative, and appeal can be defined using the Session Defaults page. These defaults override any user defaults that have been defined. Session defaults can also be changed at any point during the transaction entry process.

See Also

Chapter 2, “Setting Up Your PeopleSoft Contributor Relations Framework,” Defining User Defaults, page 7

Chapter 22, “Entering Commitments,” Selecting Session Defaults, page 377

Understanding Business Units and the Membership Process

The following process describes how business units work within the membership process. This process assumes you have already set up your operational structure, including business units and setIDs, and secured it. The process also assumes you have defined user defaults and setup values for the commitment entry process.

To work with business units throughout the membership process:

1. Define setup values for membership including appeals, membership types, and membership categories.

See Chapter 8, “Setting Up Membership Initiatives,” Setting Up Membership Types, page 96 and Chapter 8, “Setting Up Membership Initiatives,” Defining Membership Categories, page 97.

2. Create a member organization within a business unit.
3. Define member dues for the member organization. When defining dues, specify default designations to which dues payments are allocated. Select a designation business unit, designation, initiative code, and amount for each designation to which a portion of the dues payment is allocated.

See Chapter 18, “Managing Membership,” Creating a Member Organization, page 315.

4. Create a membership initiative. Select a business unit to associate with the membership initiative. This “owner” business unit controls the available prompt values when selecting a responsible department, selecting an associated member organization, defining annual goals, selecting a public relations appeal, and selecting an appeal for a budget expense.

See Chapter 16, “Managing Initiatives,” Defining an Initiative, page 270.

5. Receive a membership payment/open a membership session. Select a business unit for the session. When you assign membership dues designations, the values defined on the Member Dues page populate the fields on the Designations page. You can edit the Initiative and Amount fields.

See [Chapter 18, “Managing Membership,” Entering Member Dues, page 328](#).

Business Unit security is applied to functional groups within PeopleSoft Contributor Relations through a user-defined setting based on components not records. Therefore, it has not been applied to PeopleSoft Query. Contributor Relations records are delivered in the system without a Query Security Record attached, but an example of how you could extend your Business Unit security to PeopleSoft Query is provided.

It is important to remember that there are two ways of using Business Unit within PeopleSoft Contributor Relations.

The first is the Business Unit owning the transaction (Gift, Pledge, Member payment, etc.), and the second is the Designation Business Unit or the Business Unit to which some portion of a transaction amount is directed. The first is represented by the BUSINESS_UNIT field throughout the system, while the second is represented by the AV_DES_BU field. In most cases, Business Unit security is applied to the AV_DES_BU field throughout the system when invoked. There are, however, some cases where the Business Unit security setting is applied to the owning Business Unit as opposed to the Designation Business Unit. When designing queries and query security records, deciding where to apply the security affects which query security record is used and what data is returned. If securing by owning Business Unit, the query security record AV_BU_SCRTY_VW is used, and if securing by Designation Business Unit, the query security record AV_BU_SCRTY_DES should be used.

Applying security to both Business Unit types in a query most likely does not produce the desired result. For example, take an installation that has three business units BU1, BU2, and BU3. A gift is entered by Business Unit BU1 and some of the gift is directed toward a designation fund in BU3. A user exists who has security access to see the gift information for BU3 only. If query security were applied at the owning Business Unit level, the user would be prevented from seeing that portion of the gift directed to their Business Unit. If both owning Business Unit and Designation Business Unit security was applied in a query at the same time, the owning Business Unit application would prevent the Designation Business Unit from even being considered. If the query security was applied at the Designation Business Unit level only, the user could only see that portion of the gift that was given to their Business Unit.

Examining a Query Security Example

There are two methods for applying Business Unit security to PeopleSoft Query:

- Using the PeopleTools Query Security Record function and one of the delivered Business Unit Security records (AV_BU_SCRTY_VW and AV_BU_SCRTY_DES). Use this method to provide records for which your user population can create queries that are automatically secured by PeopleTools.
- Using a subquery and the query metastring %OPERATORID. Use this method to develop queries (or Query/Crystal reports) that are created centrally for your user population but available for your users to execute on their own.

There are three delivered queries provided to illustrate the two methods:

- AV_SECURITY_EXAMPLE_NONE
- AV_SECURITY_EXAMPLE_SECURED
- AV_SECURITY_EXAMPLE_SECURED2

Unsecured Example

The query AV_SECURITY_EXAMPLE_NONE is an unsecured query of Recognitions with the following criteria:

- Credit type *Hard*.
- Person recognitions only.
- Posted.
- Not adjusted.
- Institution equal to *PSUNV*.

The result of this query is the data to which the query security is applied in the next two examples. To see the impact on the query results with each type of setup, run the query as a user with access to all Business Units then as a user with access to only one Business Unit.

Owning Unit	Sess No	Gift No	Gift Amt	Gift Type	ID	Name	Recog	Recog Amt	Recog %
MEDBU	92	200	USD 2,500	PP	AV0008	Carroll, James	Hard Credit	USD 2,500	100
MEDBU	92	201	USD 500	PP	AV0010	Kuney, Dara	Hard Credit	USD 500	100
PSUNV	69	134	USD 100	G	DM0049	Nguyen, Kimberly	Hard Credit	USD 100	100
PSUNV	70	135	USD 250	G	DM0041	Chang, Zheng	Hard Credit	USD 250	100
PSUNV	70	136	USD 250	G	DM0040	Szyborski, William	Hard Credit	USD 250	100
PSUNV	71	137	USD 50	G	DM0040	Szyborski, William	Hard Credit	USD 50	100
PSUNV	71	138	USD 100	G	DM0040	Szyborski, William	Hard Credit	USD 100	100
PSUNV	71	139	USD 150	G	DM0040	Szyborski, William	Hard Credit	USD 150	100
PSUNV	71	140	USD 200	G	DM0040	Szyborski, William	Hard Credit	USD 200	100

Owning Unit	Sess No	Gift No	Gift Amt	Gift Type	ID	Name	Recog	Recog Amt	Recog %
PSUNV	71	141	USD 200	G	DM0040	Szymborski, William	Hard Credit	USD 200	100
PSUNV	71	142	USD 250	G	DM0040	Szymborski, William	Hard Credit	USD 250	100

Using the PeopleTools Query Security Record Function

The next query, AV_SECURITY_EXAMPLE_SECURED, includes a record, AV_RECOG_SEC_VW that has a security view attached to it via the Query Security Record attribute. In this case, the Query Security Record is AV_BU_SCRTY_DES. This record is a view of PS_AV_SCRTY_BU_TBL substituting the AV_DES_BU field for the Business Unit field. When a record has a Query Security View attached, PeopleSoft Query automatically adds a filter of {Security_Record}.OPRID = %OPERATORID. At run time, the %OPERATORID string is substituted with the user ID of the current user. PeopleTools also joins the record and its Query Security record by other common keys. In this manner, the user only sees the AV_RECOG_SEC_VW records to which they have security.

With the same data set and a user who only has access to the Business Unit *MEDBU*, the results are as follows (notice the absence of any data for the *PSUNV* Business Unit):

Owning Unit	Sess No	Gift No	Gift Amt	Gift Type	ID	Name	Recog	Recog Amt	Recog %
MEDBU	92	200	USD 2,500	PP	AV0008	Carroll, James	Hard Credit	USD 2,500	100
MEDBU	92	201	USD 500	PP	AV0010	Kuney, Dara	Hard Credit	USD 500	100

Using a subquery for security

The final query, AV_SECURITY_EXAMPLE_SECURED2, is similar to the unsecured example above in that it uses the base unsecured tables. In this case however, a subquery is added to provide the join to the Business Unit Security table and only return rows to which the current user has authority. Because security is applied to the Designation Business Unit in this example, the record AV_RCG_DES is substituted for the record AV_RECOGNITION from the unsecured query. The field AV_DES_BU is now available for applying the query security. The subquery appears as a filter on the AV_DES_BU field when the Criteria tab is selected. The subquery uses the AV_SCRTY_BU_TBL and criteria of OPRID = %OPERATORID to substitute the user ID of the user currently executing the query.

With the same data set and a user who only has access to the Business Unit *MEDBU*, the results are as follows (notice the absence of any data for the *PSUNV* Business Unit):

Owning Unit	Sess No	Gift No	Gift Amt	Gift Type	ID	Name	Recog	Recog Amt	Recog %
MEDBU	92	200	USD 2,500	PP	AV0008	Carroll, James	Hard Credit	USD 2,500	100
MEDBU	92	201	USD 500	PP	AV0010	Kuney, Dara	Hard Credit	USD 500	100

Adding Resources

This section discusses how to:

- Add staff and volunteers.
- Define units.
- Define roles.
- Define staff, unit, and volunteer roles.
- View staff members and volunteers.

Understanding Resources

You can add staff members, volunteers, and business units to the system, then assign the roles they play at your institution. Resources are used throughout your system for managing prospects, controlling gift sessions, and so on.

Important! A person must have an ID in the system before being added as a staff member. This process is required to have access to many functions throughout your PeopleSoft Contributor Relations system. We recommend that you spend some time determining the roles at your institution and carefully assign resources to those roles.

The following table lists the editable pages affected by roles throughout your PeopleSoft Contributor Relations system. The displayed values in the Role field depend upon how you assign roles. In some cases, the displayed values also depend on the settings you make on the CR Installation page. Titles preceded by an asterisk contain a Role field that is dependent upon the settings you make on the CR Installation page.

Pages Affected by Role	
Page Name	Title
AV_ACKNLDG_SETUP	Acknowledgement Setup1
AV_ACKNLDG_SETUP2	Acknowledgement Setup2

Pages Affected by Role	
AV_ACKNLDG_SETUP3	Acknowledgement Setup3
AV_BEQUEST_INFO	*Bequest Information
AV_CNST_ACTN2	*Action Info (for Prospect Actions)
AV_DESIGNATION2	Designation Funds 2
AV_GIFTAN_INFO	*Gift Annuity Information
AV_INTV_ACTN2	*Action Info (for Initiative Actions)
AV_INTV_CMPGN_RSRC	*Campaign Resources
AV_INTV_EVNT_RSRC	*Event Resources
AV_INTV_MEMBR_RSRC	*Membership Resources
AV_INTV_OTHR_RSRC	*Other Resources
AV_INTV_VOL_RSRC	*Volunteer Resources
AV_LDR_TYPE_TBL	Leadership Types
AV_MASS_PRSN	*Mass Assign Staff
AV_MASS_PRSN_WS	*Mass Assign Staff (workset version)
AV_MASS_UNIT	*Mass Assign Units
AV_MASS_UNIT_WS	*Mass Assign Units (workset version)
AV_MASS_VOL	*Mass Assign Volunteers
AV_MASS_VOL_WS	*Mass Assign Volunteers (workset version)
AV_PINC_INFO	*Pooled Income Information

Pages Affected by Role	
AV_STAFF_ASGN	*Staff Assignment
AV_TRUST_INFO	*Trust Information
AV_UNIT_ASGN	*Unit Assignment
AV_VOL_ASGN	*Volunteer Assignment
AV_VOL_GRP1_ASGN	Volunteer Group Assignments
AV_VOL_GRP2_ASGN	Sub-Group Assignments
AV_VOL_LDR_GRP	Volunteer Structure
AV_VOL_LDR_GRP_M	Volunteer Structure 2
AV_VOL_SUB_GRP	Sub-Groups
AV_VOL_SUB_GRP_M	Sub-Groups 2

Pages Used to Add Resources

Page Name	Object Name	Navigation	Usage
Define Staff, Define Volunteers	AV_STAFF_TBL	<ul style="list-style-type: none"> Design Student Administration, Define Contributor Relations, Setup, Staff, Define Staff Manage Contributor Relations, Manage Volunteers, Setup, Volunteers, Define Volunteers 	Add staff members and volunteers to the system individually.
Units	AV_UNIT_TBL	Design Student Administration, Define Contributor Relations, Setup, Units, Units	Define the formal and informal organizational units at your institution for fundraising and cultivation purposes.
Roles	AV_PRPS_TBL	<ul style="list-style-type: none"> Design Student Administration, Define Contributor Relations, Setup, Roles, Roles Manage Contributor Relations, Manage Volunteers, Setup, Roles, Roles 	Set up the various roles for resources at your institution.
Staff Roles, Unit Roles, and Volunteer Roles	AV_STAFF_PRPS_TBL, AV_UNIT_PRPS_TBL	<ul style="list-style-type: none"> Design Student Administration, Define Contributor Relations, Setup, Staff Roles Design Student Administration, Define Contributor Relations, Setup, Unit Roles Manage Contributor Relations, Manage Volunteers, Setup, Volunteer Roles 	Set up valid roles for individual resources at your institution.
View Staff, View Volunteers	AV_INST_STAFF, AV_INST_VOL	<ul style="list-style-type: none"> Design Student Administration, Define Contributor Relations, Inquire, Staff Design Student Administration, Define Contributor Relations, Inquire, Volunteers 	View a list of all the staff members and volunteers defined at your institution.

Adding Staff and Adding Volunteers

Access the Define Staff page.

Define Staff

Capozzelli, Mario **Staff ID:** AV0022 **Institution:** PSUNV

Detail View All First 1 of 1 Last

***Effective Date:** 07/01/1995 ***Status:** Active

Description: Development Officer II

Short Description: Dev Off II

End Date:

Define Staff page

The appearance of this page changes, depending on whether you are adding staff or volunteers.

Defining Units

Access the Units page.

Units

Unit Code: ANNLGVG **Institution:** PSUNV

***Description:** Annual Giving

Short Description: Annual Gvg

Department: ADVANCEMN University Advancement

Units page

The units you define here are for use by this application only, and are different than the business units used to differentiate between sectors of your institution throughout the system. Using Prospect Manager, you have the ability to assign institutional units to prospects for particular cultivation purposes. Common examples of units include Annual Fund, College of Fine Arts, and Development Office.

Department

Select the department at your institution to which the unit belongs.

Note. This field is optional and is provided for use in customized reports only.

Defining Roles

Access the Roles page.

Roles

Role: CM

View All First 1 of 1 Last

Effective Date: 01/01/1900

*Status: Active

*Description: Campaign Manager

Short Description: Campaigns

*Purpose Type: Assignment

☒ Staff
☐ Volunteer
☐ Unit

Roles page

A role is a description of the undertakings a resource takes on at your institution. Examples of roles include Prospect Manager, Solicitor, Campaign Manager, and so on. Roles are used heavily throughout your system in assigning resources to prospects and initiatives.

The following values are required in the PURPOSE_CD field that resides in the AV_PRPS_TBL table:

Roles Required Values		
Code	Value	Where Used
PM	Prospect Manager	Prospect Management
SOL	Solicitor	Prospect Management
GPS	Gift and Pledge Supervisor	Session Management
GE	Gift Entry Operator	Session Management
GCA	Giving Club Administrator	Giving Club Management
MS	Membership Supervisor	Membership Management

Purpose Type

Select *Administrative* when creating internal assignments, such as Gift and Pledge Supervisor, that are not used when assigning a resource to a prospect. Select *Assignment*, such as Prospect Manager, to assign a resource to a prospect.

Staff

Select to indicate that this role applies to staff resources. For example, if a Prospect Manager must always be a staff member, select this check box and clear the others. This results in the prompt views returning the proper role values for staff.

Volunteer

Select to indicate that this role applies to volunteer resources.

Unit Select to indicate that this role applies to unit resources.

Warning! The Staff, Volunteer, and Unit check boxes only affect the system if you have selected the Class option on the CR Installation page. When you select Class, you are indicating that all the role codes defined for a resource type are available to every person or unit that’s part of that resource type. For example, if you define the role of Prospect Manager and select the Staff check box, then all the staff members at your institution can be assigned as Prospect Managers. If you select the Defined option on the CR Installation page, then resources can only be assigned to prospects for the roles you select for them on the Staff Roles, Unit Roles, or Volunteer Roles pages. For example, if staff member Darla Perkins is a Prospect Manager, you must first define Prospect Manager as a role code, then select that role code for Darla Perkins on the Staff Roles page. PeopleSoft recommends that you select the appropriate Staff, Volunteer, or Unit check boxes on this page, regardless of the option you select on the CR Installation page. If you do so, and your institution decides to switch from Defined to Class installation mode, your role codes are already set up.

Defining Staff, Unit, and Volunteer Roles

Access the Staff Roles, Unit Roles, or Volunteer Roles page.

Staff Roles

Staff ID: AV0022

Capozzelli,Mario

Institution: PSUNV

View All

First

1-2 of 2

Last

*Role

PM

Prospect Manager

+

-

SOL

Solicitor

+

-

Staff Roles page

The appearance of this page changes, depending on whether you are defining roles for staff, volunteers, or units.

Role Select the role to associate with the resource. The role’s description displays to the right of the code.

Important! Individual staff, volunteer, and unit roles are used in the system if you select the Defined installation mode for assignments on the CR Installation page.

Viewing Staff Members and Volunteers

Access the View Staff and View Volunteers pages.

Note. Assigning the GPS or MS roles to an individual gives special authority in Session Management to reopen the expected amounts and counts, reopen a balanced session, or transfer sessions on the Session Summary page.

CHAPTER 3

General Functions Used Throughout the System

This chapter gives an overview of some general functions used throughout PeopleSoft Contributor Relations and describes how to:

- Use the spouse link.
- Work with worksets.
- Create service indicators.

Using the Spouse Link

When a constituent has a relationship with the type of spouse established, the Spouse link appears in the top right-hand corner of many pages when the constituent's record is retrieved.



Click to retrieve the constituent's spousal record on the current page. Once the spouse's record is retrieved, that record carries forward as you navigate from page to page.

To return to the constituent's record, click the link. This link acts as a toggle switch, enabling you to move back and forth between spouse records.

Working With Worksets

This section provides an overview of worksets and discusses how to:

- Create a workset.
- Join worksets.
- Build a workset using a page in the system.

Understanding Worksets

On many pages throughout the system you can create worksets, or groups of records that you review or update simultaneously. Worksets are a powerful tool when your work revolves around a group of constituents, because you do not have to retrieve each record individually to look at or update information.

You can load a workset into a page to work with a set of records at one time, rather than having to individually access each record. You can also save, update, join, and reuse worksets.

Pages Used to Create and Join Worksets

Page Name	Object Name	Navigation	Usage
Manage Worksets	AV_WORKSET	<ul style="list-style-type: none"> • Manage Contributor Relations, Analyze Giving History, Workset, Manage Worksets, Manage Worksets • Manage Contributor Relations, Enter Commitments, Workset, Manage Worksets, Manage Worksets • Manage Contributor Relations, Manage Organizations, Workset, Manage Worksets, Manage Worksets • Manage Contributor Relations, Manage People, Workset, Manage Worksets, Manage Worksets • Manage Contributor Relations, Manage Memberships, Workset, Manage Worksets, Manage Worksets • Manage Contributor Relations, Manage Prospects, Workset, Manage Worksets, Manage Worksets • Manage Contributor Relations, Manage Volunteers, Workset, Manage Worksets, Manage Worksets 	Create worksets.

Page Name	Object Name	Navigation	Usage
Join Worksets	AV_WSET_JOIN	<ul style="list-style-type: none"> • Manage Contributor Relations, Analyze Giving History, Workset, Join Worksets, Join Worksets • Manage Contributor Relations, Enter Commitments, Workset, Join Worksets, Join Worksets • Manage Contributor Relations, Manage Organizations, Workset, Join Worksets, Join Worksets • Manage Contributor Relations, Manage People, Workset, Join Worksets, Join Worksets • Manage Contributor Relations, Manage Memberships, Workset, Join Worksets, Join Worksets • Manage Contributor Relations, Manage Prospects, Workset, Join Worksets, Join Worksets • Manage Contributor Relations, Manage Volunteers, Workset, Join Worksets, Join Worksets 	Join two or more worksets by either adding the records from two worksets together or by excluding the records in the worksets that are not common.

Creating a Workset

Access the Manage Worksets page.

Manage Worksets

Workset Code: BOTH **Total Members:** 9

Description:

Short Description:

Workset Detail [View All](#) First 1-7 of 9 Last

*ID Type	ID			
Org	AV1000		Ford Motor Company	
Org	AV1010		Bechtel Power Company	
Org	AV1050		Ford Foundation	
Org	AV2000		Lambert Manufacturing	
Person	AC1000		Smith,Maggie	
Person	AV0001		Gallegher,Shawn	
Person	AV0010		Kuney,Dara	

Manage Worksets page

- Total Members** The number of records in the workset.
- Description** A free-text field describing the contents of the workset.
- Short Description** The first 10 characters of the Description field. You can modify this text.
- ID Type and ID** Select the ID type and ID for each constituent to include in the workset.

Joining Worksets

Access the Join Worksets page.

Join Worksets

Workset To Be Built

Workset Code: **Description:**

Method:

Worksets To Be Joined

Workset Code: People

Workset Code: Orgs

Join Worksets page

Workset To Be Built

- Workset Code** Select the code for the first workset in the set to join. You define workset codes when you create a workset.

Description	The description of the workset that appears when you press TAB from the Workset Code field. The resulting joined workset inherits the name of the workset that you select.
Method	<p>Select a method for joining the two worksets.</p> <p><i>Add:</i> Select to add the records in the selected workset to the records in another workset without excluding any records.</p> <p><i>Exclusive:</i> Select to remove non-matching records from both worksets.</p>
Build	Click to create the workset.

Worksets To Be Joined

Workset Code	Select the code for each workset that to be joined.
---------------------	---

Building a Workset From a Page in the System

There are several pages in PeopleSoft Contributor Relations that you can use to form a workset:

- Prospect List
- Employee List
- Roster List
- Acknowledge Suspense
- Acknowledge List
- Top Donors
- Giving Club Membership Summary
- Resource Assignments

To build a workset while you are using one of these pages:

1. Select the Workset check box to include the prospect in a workset.
2. To include all the records on the page, click *All*.
3. To create a new workset, add to an existing workset, or override an existing workset with the selected prospects, type or select the short name for the workset in the Workset field. If you are creating a new workset, type text describing the workset in the Description field.
4. Select *Add* to add the selected prospects to an existing workset without changing the existing workset records.
5. Select *Overwrite* to overwrite the records in an existing workset with the records you selected.
6. Select *Exclusive* to remove records from an existing workset that do not match the records you selected.
7. Click Build to create the workset.

Creating Service Indicators

You can create and review service indicators, or tags that provide important information about a constituent. For example, service indicators might be *Verified Deceased*, *Do Not Call*, *Do Not Solicit*, *Do Not Mail*, and so on.

The pages and process that you use to create and review service indicators in your system are identical to those used in the PeopleSoft Campus Community application.

See Also

PeopleSoft 8 SP1 Campus Community PeopleBook

CHAPTER 4

Setting Up Constituent Data

This chapter lists prerequisites and discusses how to:

- Define constituent types.
- Define involvement categories.
- Define involvement types.
- Define involvement codes.
- Define person and organizational relationships.
- Define organization reciprocal relationships.
- Set up contact types.

Note. This portion of PeopleSoft Contributor Relations is intended to expand on the functionality provided in PeopleSoft Campus Community to further meet the needs of development officers in accessing information.

Prerequisites

Nothing is more important than knowing who your constituents are. Constituents provide resources, support and promote programs, and *advance* your institution through their gifts of time, ideas, and financial support.

Before you begin the process of setting up your system for processing people and organization data, consider the following:

- How do you plan to set up staff members and roles?

You may want to create a spreadsheet including staff member name, job title, and roles.

- How does your institution want to assign roles to staff, volunteer, and unit resources for prospect and initiative management?
- What relationships between people and organizations does your institution record?
- What relationships between organizations does your institution track?
- How do you want to use service indicators?

The values you set up are used for both people and organizations.

- What constituent involvement does your institution track?

You may want to create a spreadsheet of Involvement Categories, Types, and Codes to refine your scheme before entering it in the system.

- What type of contacts does your institution deal with at organizations?

Defining Constituent Types

This section discusses how to set up constituent data.

Understanding Constituent Types

Constituent types describe the relationships between a constituent and your institution. When you define constituent types, the number you enter in the Constituent Type field defines the order of priority for the type according to CASE.

Constituent types are shipped with your system and should only be changed if CASE codes change because the system uses them to produce the annual CASE gift income report.

The following values are required in the CNST_TYPE field that resides in the AV_CTYP_CD_TBL table:

Constituent Types Required Values	
Code	Value
1	Alumni
2	Alumni, Non-Degreed
3	Student
4	Parent
5	Friend
6	Faculty
7	Staff
8	Non-Alum Spouse of Alumni
9	Other
10	Corporation
11	Corporate Foundation
12	Foundation

Constituent Types Required Values	
13	Personal, Family Foundation
14	Fund-Raising Consortia
15	Association
16	Religious Organization
17	Government
18	Government Foundation
19	Other

Important! When you define constituent types, the number you enter in the Constituent Type field defines the order of priority for the type according to CASE. When people and organizations have multiple constituent types assigned to them, the type with the highest priority displays throughout the system.

Page Used to Define Constituent Types

Page Name	Object Name	Navigation	Usage
Define Constituent Types	AV_CTYP_CD_TBL	<ul style="list-style-type: none"> Manage Contributor Relations, Manage Organizations, Setup, Constituent Types, Define Constituent Types Manage Contributor Relations, Manage People, Setup, Constituent Types, Define Constituent Types 	Define the valid constituent types, or relationships between a person or organization and your institution.

Using the Define Constituent Types Page

Access the Define Constituent Types page.

Define Constituent Types

Constituent Type:1

View All

First

1 of 1

Last

Effective Date:

01/01/1900

Status:

Active

ID Type:

Person

Description:

Alumni

Short Description:

Alumni

Define Constituent Types page

Examples of constituent types are *Alumni*, *Friend*, *Parent*, *Faculty*, and so on.

ID Type

Determine whether this constituent type applies to people or organizations. Available options are *Person* and *Org ID*. If a constituent type can apply to both people and organizations, enter the constituent type twice, selecting *Person* once, then *Org ID*.

Defining Involvement Categories

This section discusses how to define involvement categories.

Page Used to Define Involvement Categories

Page Name	Object Name	Navigation	Usage
Involvement Categories	AV_INVLV_C_TBL	<ul style="list-style-type: none">Manage Contributor Relations, Manage Organizations, Setup, Involvement Categories, Involvement CategoriesManage Contributor Relations, Manage People, Setup, Involvement Categories, Involvement Categories	Define the various categories used to sort involvement information.

Using the Involvement Categories Page

Access the Involvement Categories page.

Involvement Categories

Involvement Category:

ACAD

View All

First

1 of 1

Last

*Effective Date:

01/01/1900

*Status:

Active

*Description:

Academic

Short Description:

Academic

Involvement Categories page

Involvement is a constituent’s activities, affiliations, interests, and awards and honors. When you create an involvement record, you identify the involvement type, a description of the involvement, a category, an institution, and start and end dates. Examples of involvement categories are Professional, Charitable, Academic, Social, and Religious.

The following values are required in the GIFT_TYPE field that resides in the AV_GFT_TYPE_TBL table:

Involvement Categories Required Values	
Code	Value
CHAR	Charitable

Defining Involvement Types

This section discusses how to define involvement types.

Page Used to Define Involvement Types

Page Name	Object Name	Navigation	Usage
Involvement Types	AV_INVLV_T_TBL	<ul style="list-style-type: none">Manage Contributor Relations, Manage Organizations, Setup, Involvement Types, Involvement TypesManage Contributor Relations, Manage People, Setup, Involvement Types, Involvement Types	Define the various types of constituent involvement to track.

Using the Involvement Types Page

Access the Involvement Types page.

Involvement Types page

Examples of involvement types are Activities, Interests, Awards/Honors, or Affiliations.

Use Date Received

Select if the involvement type has one particular date, rather than a date range. For example, an honor or award is received on one date, and does not involve a date range. If you select this check box, the Date Received field on the Involvement page is available for input and the Start Date and End Date fields are not available for input.

Use Start/End Dates

Select if the involvement type has a date range. For example, an affiliation with a club or other organization can span a date range. If you select this check box, the Start Date and End Date fields on the Involvement page are available for input and the Date Received field is not available for input.

Defining Involvement Codes

This section provides an overview and discusses how to define involvement codes.

Understanding Involvement Codes

Involvement is a constituent's activities, affiliations, interests, and awards and honors. When you create an involvement record, you identify the involvement type, a code for the actual involvement and its related description, a category such as charitable or political, an institution, and start and end dates. An example of an involvement code might be GOLF, where the related description reads "Avid Golfer."

Page Used to Define Involvement Codes

Page Name	Object Name	Navigation	Usage
Involvement Codes	AV_INVLV_CD_TBL	<ul style="list-style-type: none"> Manage Contributor Relations, Manage Organizations, Setup, Involvement Codes, Involvement Codes Manage Contributor Relations, Manage People, Setup, Involvement Codes, Involvement Codes 	Define the different types of involvement to track at your institution.

Using the Involvement Codes Page

Access the Involvement Codes page.

Involvement Codes page

Valid Involvement Types

Select the involvement types that can utilize this involvement code. Involvement Types to choose from include *interest*, *activity*, *affiliation*, *award*, and *honor*; as well as any institution-defined involvement types.

See Also

Chapter 4, “Setting Up Constituent Data,” Defining Involvement Types, page 45

Establishing Relationships

This section provides an overview and discusses how to establish relationships.

Understanding Relationships

You can establish relationships between two people, two organizations, or a person and an organization.

The relationships you establish can be reciprocal, meaning that when you indicate a relationship on one record, the relationship is also created on the corresponding record. For example, if you are working with Shawn Gallegher and you create a relationship for him as a trustee of Ford Motor Foundation, the opposite relationship is automatically built on Ford Motor Company's record.

Common Elements Used in This Section

Relationship Nbr (relationship number)	A relationship number is automatically generated when you establish and save a relationship.
Related ID	Enter the ID of the organization to which this organization is related. Select a related ID if the organization exists in the system.
Relationship	Select the nature of the relationship, whether person to the organization, between organizations, or organization to person. Relationship types are shipped with your system as translate values. Do not modify these translate values in any way. Any modifications to these values will require a substantial programming effort.
Source Description	Enter the name of the person or publication providing your institution with information about this relationship.

Pages Used to Establish Relationships

Page Name	Object Name	Navigation	Usage
Organization Relationships	AV_RELATIONSHIPS_E	<ul style="list-style-type: none"> Manage Contributor Relations, Manage Organizations, Use, Org to Org Relationships, Relationships Manage Contributor Relations, Manage Prospects, Use, Org to Org Relationships, Relationships 	Record information about a relationship between two organizations.
Address Detail	AV_ADDRESS_SP, AV_ADDRESS_2_SP	<ul style="list-style-type: none"> You can access the Address Detail page through multiple navigation paths. Below is the most frequently used path. Click the Address link on the Relationships page. 	Enter and view address information for a person or organization who does not have a record in the system.

Page Name	Object Name	Navigation	Usage
Person to Org Relationships	AV_RELATION_PE	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage People, Use, Person to Org Relationships, Person / Org Relationships • Manage Contributor Relations, Manage Prospects, Use, Person to Org Relationships, Person / Org Relationships 	Establish a relationship from a person to an organization. Use this page when creating the relationship from the person's record to the organization.
Org/Person Relationships	AV_RELATION_EP	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Organizations, Use, Org to Person Relationships, Org / Person Relationships • Manage Contributor Relations, Manage Prospects, Use, Org to Person Relationships, Org / Person Relationships 	Establish a relationship from an organization to a person. Use this page when creating the relationship from the organization's record to the person.
Relationship Summary	AV_RELATION_PNL, AV_RELATION_PNL_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage People, Inquire, Relationship Summary • Manage Contributor Relations, Manage People, Workset, Relationship Summary 	View information about the relationships a person has with other people and organizations.
Relationship Detail	AV_RELATE_E_SP, AV_RELATION_EP_SP, AV_RELATION_PE_SP	Click the Detail button on the Relationship Summary page.	View additional information about a particular relationship, such as relationship begin and end dates, address information, and comments.
Organization Relationship Summary	AV_ORG_RELATION, AV_ORG_RELATION_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Organizations, Inquire, Relationship Summary • Manage Contributor Relations, Manage Organizations, Workset, Org Relationship Summary 	View information about the relationships an organization has with other people and organizations.

Establishing a Person to Person Relationship

Use the Relationships page to record information about relationships between two people.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Maintaining Bio /Demographic Data,” Entering Relationships Data

Establishing an Organization to Organization Relationship

Access the Relationships page.

Relationships

Ford Motor Company ID: AV1000

Relationship Detail View All First 1 of 2 Last

Relation Nbr: 30 Related ID:

Relationship: Branch Reciprocal Relation: ☐

Description: Testing

Begin Date: 09/19/2000 End Date:

Source Description:

Email ID:

URL Address:

Comment:

[Address](#)

Relationships page

Reciprocal Relation

Select the reverse of the relationship. For example, if an organization is a parent company, the reciprocal relation might be *Subsidiary*. Reciprocal relations are defined by your institution using the Reciprocal Relationship page.

Description

If you did not select a related ID, enter the name of the related organization. If you selected a related ID, the name of the organization appears.

Address

If the related organization does not have an ID in the system, click to enter address information on the Address Detail page.

See Also

PeopleSoft 8 SPI Campus Community Fundamentals PeopleBook, "Maintaining Bio/Demographic Data," Managing Addresses

Establishing a Person to Organization Relationship

Access the Person/Org Relationships page.

Person / Org Relationships

Gallagher, Shawn ID: AV0001
 Constituent Type: Alumni Yr: 2001 Institution: PSUNV

Relationships View All First 1 of 2 Last

Relation Nbr: 11 Related ID: AV2000

*Relationship: Board Member/Officer
 Description: Lambert Manufacturing
 Begin Date: 08/15/1996 End Date:
 Source Description:
 Comment:
[Address](#)

Person/Org Relationships page

Description Displays the name of the related organization.

Establishing an Organization to Person Relationship

Access the Org/Person Relationships page.

Org / Person Relationships

Ford Motor Company ID: AV1000
 Constituent Type: Foundation Institution: PSUNV

Relationship Detail View All First 1 of 3 Last

Relation Nbr: 19 Related ID: AV0008

*Relationship: Corporation
 Name: Carroll, James
 Prefix: Suffix:
 Gender: U SSN: 877-99-1777
 Begin Date: 07/31/1998 End Date:
 Source Description:
 Comment:
[Address](#)

Org/Person Relationships page

Name If you did not select an ID, enter the name of the related person. If you selected an ID, the person's name appears.

Prefix If you did not select an ID, select a name prefix. If you selected an ID, the person's name prefix appears.

Suffix	If you did not select an ID, select a name suffix. If you selected an ID, the person's name suffix appears.
SSN (social security number)	If you did not select an ID, enter the person's SSN. If you selected an ID, the person's SSN appears.

Defining Person and Organization Relationships

This section discusses how to define person and organization relationships.

Page Used to Define Person and Organization Relationships

Page Name	Object Name	Navigation	Usage
Person/Org Relationships	AV_PE_RELATION_TBL	<ul style="list-style-type: none"> Manage Contributor Relations, Manage Organizations, Setup, Org / Person Relationships, Person / Org Relationships Manage Contributor Relations, Manage People, Setup, Person / Org Relationships, Person / Org Relationships 	Define the relationships that can exist between people and organizations in the system.

Using the Person/Org Relationships Page

Access the Person/Org Relationships page.

Person / Org Relationships

Relationship: MB

View All First 1 of 1 Last

Effective Date: 01/01/1900

Status: Active

Person Description: Member

Org Description: External Organization

Person/Org Relationships page

Person Description Enter the relationship the person has with the organization. For example, if you are defining a trustee/foundation relationship, the person description you enter is *Trustee*.

Org Description
(organization description) Enter the relationship the organization has with the person. For example, if you are defining a trustee/foundation relationship, the organization description you enter is *Foundation*.

Defining Organization Reciprocal Relationships

This section discusses how to define organization reciprocal relationships.

Page Used to Define Organization Reciprocal Relationships

Page Name	Object Name	Navigation	Usage
Reciprocal Relationship	AV_ORG_RELATE_TBL	Manage Contributor Relations, Manage Organizations, Setup, Org Reciprocal Relationships, Reciprocal Relationship	Set up the valid reciprocal relationships you can create when establishing relationships between organizations.

Using the Reciprocal Relationship Page

Access the Reciprocal Relationship page.

Reciprocal Relationship page

Reciprocal Relation	Select the valid relations that can be reciprocal to this relationship.
Default	Select the reciprocal relationship to default on the Organization Relationships page.

Setting Up Contact Types

Use the Contact Type Table page to define the valid contact types at organizations. An example of a contact type is *Matching Gift Coordinator*.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Setting Up Organization Data,” Defining Contact Types

CHAPTER 5

Setting Up Prospects

This chapter lists prerequisites and discusses how to:

- Set up prospect identifiers.
- Set up service indicators.

Prerequisites

Before you set up PeopleSoft Contributor Relations to manage prospects, consider the following:

- How are setIDs, record groups, and business units set up at your institution?

Define the donor appreciation items by setID.

- Do your business rules specify that a contact report is required for each completed action?

Specify this option on the CR Installation page.

- Which elements do you want to include in standard biographic (bio bit and bio brief) reports?

Review the standard bio bit and bio brief reports to determine which elements to set up as standard for each report. Each user can define custom bio bit and bio brief reports in addition to the standard reports that you format for your operations as a whole.

- How do you plan to assign resources?

Set up parameters for resource assignments using the CR Installation page.

Setting Up Prospect Identifiers

This section discusses how to:

- Define asset types.
- Define rating types.
- Define rating categories.
- Define rating indicators.
- Define action types.
- Define action contact types.

- Define action status codes.
- Define action results.
- Define donor appreciation items.

Pages Used to Set Up Prospects

Page Name	Object Name	Navigation	Usage
Assets	AV_ASSET_TBL	Manage Contributor Relations, Manage Prospects, Setup, Asset Types, Assets	Define the types of assets that are tracked by your institution.
Rating Types	AV_R_TYPE_TBL	Manage Contributor Relations, Manage Prospects, Setup, Rating Type, Rating Types	Define the valid rating types to track.
Rating Categories	AV_R_CAT_TBL	Manage Contributor Relations, Manage Prospects, Setup, Rating Categories, Rating Categories	Define the types of prospect ratings to track.
Rating Indicators	AV_R_IND_TBL	Manage Contributor Relations, Manage Prospects, Setup, Rating Indicators, Rating Indicators	Define the indicators that are used to measure a constituent's rating.
Action Types	AV_ACTN_TYPE_TBL	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Setup, Action Types, Action Types • Manage Contributor Relations, Manage Events, Setup, Action Types, Action Types • Manage Contributor Relations, Manage Memberships, Setup, Action Types, Action Types • Manage Contributor Relations, Manage Other Initiatives, Setup, Action Types, Action Types • Manage Contributor Relations, Manage Prospects, Setup, Action Types, Action Types 	Define the action types that are used at your institution.

Page Name	Object Name	Navigation	Usage
Action Contact Type	AV_ACTN_CNTC_TBL	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Setup, Action Contact Types, Action Contact Type • Manage Contributor Relations, Manage Events, Setup, Action Contact Types, Action Contact Type • Manage Contributor Relations, Manage Memberships, Setup, Action Contact Types, Action Contact Type • Manage Contributor Relations, Manage Other Initiatives, Setup, Action Contact Types, Action Contact Type • Manage Contributor Relations, Manage Prospects, Setup, Action Contact Types, Action Contact Type • Manage Contributor Relations, Manage Volunteers, Setup, Contact Types, Action Contact Type 	Define the valid contact types for actions or volunteer assignments.

Page Name	Object Name	Navigation	Usage
Action Status Codes	AV_ACTN_STAT_TBL	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Setup, Action Status Codes, Action Status • Manage Contributor Relations, Manage Events, Setup, Action Status Codes, Action Status • Manage Contributor Relations, Manage Memberships, Setup, Action Status Codes, Action Status • Manage Contributor Relations, Manage Other Initiatives, Setup, Action Status Codes, Action Status • Manage Contributor Relations, Manage Prospects, Setup, Action Status Codes, Action Status 	Define the valid statuses for prospect actions.
Action Results	AV_ACTN_RSLT_TBL	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Setup, Action Results, Action Results • Manage Contributor Relations, Manage Events, Setup, Action Results, Action Results • Manage Contributor Relations, Manage Memberships, Setup, Action Results, Action Results • Manage Contributor Relations, Manage Other Initiatives, Setup, Action Results, Action Results • Manage Contributor Relations, Manage Prospects, Setup, Action Results, Action Results 	Define the valid results for actions.

Page Name	Object Name	Navigation	Usage
Donor Appreciation Items	AV_ITEM_TBL	<ul style="list-style-type: none"> Manage Contributor Relations, Manage Memberships, Setup, Appreciation Items, Donor Appreciation Items Manage Contributor Relations, Manage Prospects, Setup, Appreciation Items, Donor Appreciation Items 	Define the various items of appreciation that are given to constituents throughout the cultivation and membership process.
Trust Types	AV_TRUST_T_TBL	Manage Contributor Relations, Manage Prospects, Setup, Trust Types, Trust Types	Define the valid types of trusts at your institution.
Trust Categories	AV_TRUST_C_TBL	Manage Contributor Relations, Manage Prospects, Setup, Trust Categories, Trust Categories	Define the valid categories for trusts at your institution.
Trust Terms	AV_TRUST_R_TBL	Manage Contributor Relations, Manage Prospects, Setup, Trust Terms, Trust Terms	Define the valid terms for trusts at your institution.

Defining Asset Types

Access the Assets page.

Assets

Asset Category: BOAT

View All First 1 of 1 Last

*Effective Date: 01/01/1900

*Status: Active

*Description: Boat

Short Description: Boat

Assets page

Assets are items of value owned by a prospect. Assets that are typically tracked include real estate, fine art, and securities.

Defining Rating Types

Access the Rating Types page.

Rating Types

Rating Type: STAFF

View All First 1 of 1 Last

*Effective Date: 01/01/1900

*Status: Active

*Description: Staff

Short Description: Staff

Rating Types page

Rating types indicate the type of entity that is providing a prospect's rating. Examples of rating types are *Peer*, *Vendor*, and *Staff*. For example, if your institution purchases census information from an outside party, the rating type that is associated with those ratings would probably be *Vendor* because the information was purchased from an outside source.

Defining Rating Categories

Access the Rating Categories page.

Rating Categories

Rating Category: GIFTCP

View All First 1 of 1 Last

*Effective Date: 01/01/1900

*Status: Active

*Description: Gift Capacity

Short Description: Gift Capac

Rating Categories page

Rating categories are descriptive classifications of a rating and are defined by your institution. They are used in prospect management to qualify prospects for giving. Assign ratings to a constituent on the Ratings page.

Examples of rating categories are *Household Income*, *Gift Capacity*, and *Overall Readiness*.

Defining Rating Indicators

Access the Rating Indicators page.

The screenshot shows the 'Rating Indicators' page. At the top, there is a tab labeled 'Rating Indicators'. Below it, the 'Indicator Code' is 'LIFSTY'. A blue navigation bar contains 'View All', 'First', '1 of 1', and 'Last'. The main form fields are: '*Effective Date:' with a date picker set to '01/01/1900', '*Status:' with a dropdown menu set to 'Active', '*Description:' with a text box containing 'Lifestyle-01B', and 'Short Description:' with a text box containing 'Lifestyle'. There are yellow '+' and '-' buttons in the top right corner of the form area.

Rating Indicators page

Rating indicators are the names and descriptions of a specific screening indicator used by the institution. They are used in prospect management to help qualify a prospect's potential to support the philanthropic organization. Assign ratings to a constituent on the Ratings page.

Examples of rating indicator descriptions are *PPR-03H*, *Lifestyle-01B*, and *Rank Percentile 98*.

Defining Action Types

Access the Action Types page.

The screenshot shows the 'Action Types' page. At the top, there is a tab labeled 'Action Types'. Below it, the 'Action Type Code' is 'ASK'. A blue navigation bar contains 'View All', 'First', '1 of 1', and 'Last'. The main form fields are: '*Effective Date:' with a date picker set to '01/01/1900', '*Status:' with a dropdown menu set to 'Active', '*Description:' with a text box containing 'Ask', and 'Short Description:' with a text box containing 'Ask'. Below these fields are two checked checkboxes: 'Constituent Action' and 'Initiative Action'. There are yellow '+' and '-' buttons in the top right corner of the form area.

Action Types page

An action type is the form of action that is taken with a particular donor prospect or for a particular initiative. For donor prospects, action types might include an ask, invitation, information gathering, or presentation proposal. For initiatives, action types might include a design session, vendor selection, or layout meeting.

When you create an action, you associate it with an action type. You can then track the information that is specific to that action type. For example, if the action type is *Ask*, you can enter an ask amount.

The selections you make on this page determine the values in the Action Type field when creating an action.

The following values are required in the ACTN_TYPE_CD field that resides in the AV_ACTN_TYP_TBL table:

Action Type Required Values	
Code	Value
ASK	Ask

Action Type Code Displays the code for the action type.

Note. This value comes from the ACTN_TYPE_CD field in the AV_ACTN_TYP_TBL table.

Constituent Action Select if the action type applies to actions that deal with prospects or constituents.

Initiative Action Select if the action type applies to actions that are generated through an initiative.

Defining Action Contact Types

Access the Action Contact Type page.

The screenshot shows the 'Action Contact Type' page. At the top, the title 'Action Contact Type' is in a tabbed interface. Below it, 'Contact Type Code:' is set to 'LETTER'. A table displays one record with the following details:

- *Effective Date:** 01/01/1900
- *Status:** Active
- *Description:** Letter
- Short Description:** Letter
- ☒ **Constituent Action**
- ☒ **Initiative Action**
- ☒ **Volunteer**

Navigation controls at the top right include 'View All', 'First', '1 of 1', and 'Last'.

Action Contact Type page

When you create an action or a volunteer assignment in PeopleSoft Contributor Relations, you select a contact type. The contact type determines whether the person performs the action using a telephone call, a letter, an email, a personal visit, or some other method. When managing prospects, a contact type could be a personal visit. When managing initiatives, a contact type could be a meeting or phone call.

The selections that you make on this page determine the available values in the Contact Type field on the Volunteer Assignments 2 page, used when creating an action or a volunteer assignment.

Constituent Action Select if the contact type applies to prospect actions.

Initiative Action Select if the contact type applies to actions that are generated through an initiative.

Volunteer

Select if the contact type applies to volunteer assignments.

Defining Action Status Codes

Access the Action Status page.

Action Status page

As you create, schedule, and complete an action, its status changes. This page enables you to define the status codes that appear in the Action Status prompt dialog boxes throughout the system.

The selections you make on this page determine the values in the Action Type field on the Prospect Action page, used when creating an action.

The following values are required in the ACTN_STAT_CD field that resides in the AV_ACTN_STA_TBL table:

Action Status Codes Required Values	
Code	Value
CMP	Complete
SCH	Scheduled

Constituent Action

Select if the action status applies to prospect actions.

Initiative Action

Select if the action status applies to actions that are generated through an initiative. Examples of action status include scheduled, on hold, or suspended.

Defining Action Results

Access the Action Results page.

Action Results

Result Code: DECL

View AllFirst1 of 1Last

*Effective Date:10/18/2000

*Status:Active

*Description:Declined

Short Description:Declined

☒ Constituent Action

☒ Initiative Action

Action Results page

The selections you make on this page determine the values in the Result field on the Action Results page (Manage Contributor Relations, Manage Prospects, Use, Actions, Action Results), used when completing a prospect action.

The following values are required in the ACTN_RSLT_CD field that resides in the AV_ACTN_RLT_TBL table:

Action Result Required Value	
Code	Value
DECL	Declined
GIFT	Gift
PLEDGE	Pledge

Note. The ACTN_RSLT_CD field is used for reporting action results in the Campaign Progress report.

- Constituent Action

Select if the action result applies to prospect actions.
- Initiative Action

Select if the action result applies to actions that are generated through an initiative. Examples of action result include confirmed, contract pending, and vendor selected.

Defining Donor Appreciation Items

Access the Donor Appreciation Items page.

Donor Appreciation Items

SetID: MODEL Item Code: AER01

View All First 1 of 1 Last

*Effective Date: 01/01/1900

*Status: Active

*Item Description: Aerial Photo of Campus

Item Value: 6.66 USD

*Item Category: Donor Appreciation

Donor Appreciation Items page

Donor appreciation items are keyed by setID, so different business units can present different items to donors. A gift from a business unit may differ in look and cost, depending on the location that distributes it.

Examples of appreciation items are key chains, T-shirts, and pens.

Item Description	Enter a description of the appreciation item.
Item Value	Enter the monetary value of the item.
Item Category	Select the item category to indicate whether the item is distributed for <i>Donor Appreciation</i> or as a <i>Membership Benefit</i> . The item category determines whether the item appears as an available Item on the Donor Appreciation page or as a Standard Benefit on the Member Dues page.

Note. If you use the same item for both purposes, the item should be entered twice with slightly different codes so it appears correctly as an available option.

Setting Up Service Indicators

Use the Service Indicator Table component to define the valid service indicators that you can assign to constituents. The pages that you use to define service indicators are identical to those in PeopleSoft Campus Community.

See Also

PeopleSoft 8 SPI Campus Community Fundamentals PeopleBook, “Setting Up Service Indicators”

CHAPTER 6

Setting Up Initiatives

This chapter provides an overview of initiatives and discusses how to:

- Define initiative types.
- Define audiences.
- Define initiative goal types.
- Define methods.
- Use action components for initiative setup.
- Define budget categories.
- Set up appeal information.

See Also

[Chapter 16, “Managing Initiatives,” page 269](#)

[Chapter 7, “Setting Up Campaigns,” page 87](#)

[Chapter 8, “Setting Up Membership Initiatives,” page 95](#)

[Chapter 9, “Setting Up Volunteer Efforts,” page 99](#)

[Chapter 10, “Setting Up Event Initiatives,” page 109](#)

[Chapter 11, “Setting Up Other Initiatives,” page 111](#)

Understanding Initiatives

This section lists prerequisites and discusses initiatives.

Prerequisites

Before you set up initiatives in your system, consider the following:

- What type of goals does your institution track for initiatives?
Goal types will differ, depending on the initiative type, but may be a number of attendees, volunteers, or members, or percent increase over the previous year.
- What types of audiences do you appeal to for each initiative that your institution runs?

Create a spreadsheet of attributes and audiences for each of your initiatives to help you plan your setup. An attribute is the system field containing the information that you use to segment your audience.

- What communication methods do you use to evoke participation in your initiatives?

Examples of methods are letters, emails, and personal visits, which are set up as communication methods.

- What types of appeals do you use to reach your constituents during initiatives?

Appeal types are categories of appeals such as direct mail, phonathons, and personal solicitations. What specific appeals does your institution use for each type of initiative? Create a spreadsheet of each appeal and its type to use when you go live and as part of the conversion of gifts and pledges. Appeals can be linked to all types of initiatives and to gifts and pledges, depending on the check boxes selected on the Setup Appeal Code page.

- What categories of expenses do you track for your initiative budgets?

These are set up as budget categories.

- What aspects of actions do you want to track?

You can track four aspects of actions with your system. These action components are used for both initiatives and prospect management. You must set them up carefully. Create a spreadsheet of all four action components. Make sure that each action type can be linked to appropriate action contact types, statuses, and results.

- Action types are the general kinds of actions that you use when tracking initiatives and prospects, such as an ask or cultivation.
- Action contact types are the specific actions that your initiative staff engage in for initiatives, such as mass mailings, phonathon calls, and personal visits.
- Action status and action results are necessary for each action type and action contact type.

- What types of contact do your staff have with constituents, and for what purposes?

Create a spreadsheet of all four action components.

- What types of communications does your institution engage in for each initiative?

Much setup is necessary to produce communications from the system that are tailored to your needs. Communications is part of PeopleSoft Campus Community, which is shared by all areas on campus. You might establish some naming conventions for each office that uses communications, to make communications more manageable.

Initiatives

When developing a strategic plan for PeopleSoft Contributor Relations, an institution must identify the initiatives that will be the basis from which the plan will be carried out. An initiative is any organized effort with an expressed purpose. It can be a campaign, a membership initiative, an organized volunteer effort, an event initiative, or any other type of initiative defined by the institution. Initiatives can consist of multiple parts with other initiatives related to them, enabling the institution to track individual parts or the initiative as a whole.

The four main initiative types are:

- Campaign: An organized institutional effort targeted to a specific constituency that occurs over a specified period of time, with specific purposes and goals.
- Membership initiative: A campaign focused primarily on membership.
- Volunteer effort.

After you create an initiative or define a membership organization, you can create the volunteer structure necessary for the effort to succeed. You then assign volunteers to the positions within the volunteer structure and assign additional volunteers to perform specific tasks.

- **Event:** Any occurrence that you set up to achieve a particular result.

Events are one of the most effective ways for your institution to reach both existing and new constituents.

To create an initiative, regardless of its type, you:

- Define a time frame.
- Define participation and financial goals.
- Assign responsible resources.
- Define the target audiences.
- Determine how this function relates to others at your institution.
- Develop a communications or public relations plan to reach your target audiences.

Defining Initiative Types

Before you can create and manage an initiative, you must define the types of initiatives used by your institution.

This section discusses how to define initiative types.

Page Used to Define Initiative Types

Page Name	Object Name	Navigation	Usage
Initiative Types	AV_INTV_TYPE_TABLE	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Setup, Initiative Type Table, Initiative Types • Manage Contributor Relations, Manage Events, Setup, Initiative Type Table, Initiative Types • Manage Contributor Relations, Manage Memberships, Setup, Initiative Type Table, Initiative Types • Manage Contributor Relations, Manage Other Initiatives, Setup, Initiative Type Table, Initiative Types • Manage Contributor Relations, Manage Volunteers, Setup, Initiative Type Table, Initiative Types 	Define institution-specific initiative types.

Defining Initiative Types

Access the Initiative Types page.

Initiative Types

Initiative Type: CAMPAIGN

View All First 1 of 1 Last

*Effective Date: 07/28/1998

*Status: Active

*Description: Campaign

Short Description: Campaign

Initiative Types page

There are five delivered initiative types, which you should not modify. Institutions can define additional initiative types that fulfill their needs. Institution-defined initiative types are classified as *OTHER*.

These values are required in the INTV_TYPE field that resides in the AV_INTV_TYPE_TBL table:

Initiative Type Required Values	
Code	Value
CAMPAIGN	Campaign
EVENT	Event
VOLUNTEER	Volunteer
MEMBERSHIP	Membership
OTHER	Other Initiative

The system treats any initiative types that you add in addition to those listed in the preceding table as Other Initiative types. Other Initiative types appear as options in the Initiative Type field on the Other Initiatives page.

Defining Audiences

The values that you define here are used when creating an initiative audience.

This section discusses how to:

- Set up attribute types.
- Set up audience criteria.

Pages Used to Define Initiative Audiences

Page Name	Object Name	Navigation	Usage
Attribute Type	AV_ATTR_TYP_TBL	Design Student Administration, Define Contributor Relations, Setup, Attribute Type, Attribute Type	Set up the various attributes in the system from which to build audiences. For example, you might include involvement information as a possible attribute type that is used to build an audience of constituents.
Audience Criteria	AV_AUD_CRIT	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Setup, Audience Criteria, Audience Criteria • Manage Contributor Relations, Manage Events, Setup, Audience Criteria, Audience Criteria • Manage Contributor Relations, Manage Memberships, Setup, Audience Criteria, Audience Criteria • Manage Contributor Relations, Manage Other Initiatives, Setup, Audience Criteria, Audience Criteria • Manage Contributor Relations, Manage Volunteers, Setup, Audience Criteria, Audience Criteria 	Create selection criteria statements, or statements that provide the variables needed to identify qualified audience members when a COBOL process is run. When you assign an audience to an initiative or member organization, the actual list of audience members is generated through this COBOL process.

Setting Up Attribute Types

Access the Attribute Type page.

Attribute Type

Attribute Code: INVLV Person / Organization: OrganizationO

Attribute Type View All First 1 of 1 Last

*Effective Date: 01/01/1900

*Status: Active

Description: Involvement Code

Short Description: Involvement

Attribute Prompt Table: AV_INVLV_CD_TBL

Attribute Process Table: AV_INVLV_TBL Attribute Field: INVLV_CD

Attribute Type page

An attribute type is a characteristic that you can use to identify someone to communicate with in the system for an initiative or member organization.

Attribute Prompt Table

Enter a table name, which the system uses to populate the options in the Valid Value field on the Audience Criteria page. If you leave this field blank, the Valid Value field becomes a free-form field, and you can enter any value. However, you won't know if the value that you enter is valid until you run the process.

You might not want to use a prompt table that does not have a setup page associated with it, such as POSTAL_CODE or CLASS_YEAR. Your system's performance improves if you add the free-form value rather than prompting against a large table.

Attribute Process Table

Enter a table name. This table contains the attribute that appears on the constituent's record.

Warning! If you are defining an attribute for a person, the EMPLID field must exist in the Attribute Process table. If you are defining an attribute for an organization, the EXT_ORG_ID field must exist in the Attribute Process table.

Attribute Field

Enter the actual field in the process table where the attribute resides on a constituent's record.

These are the types and lengths of fields that the system supports for attribute types:

Field Types and Lengths Supported for Attribute Types	
Type	Maximum Field Length
Character	15

Field Types and Lengths Supported for Attribute Types	
Number	10
Signed Number (decimal fields)	12.2
Date	10

The system searches for the attribute that you selected in the locations that you entered in the previous fields. The system generates an actual audience through the Initiative Audience Build process (AVPINT), which retrieves the attributes that you select. You can access the Initiative Audience Build page to run this process.

Entering Audience Criteria

Access the Audience Criteria page.

Audience Criteria

Audience Code: POLITICAL **Pers/Org:** Organization **Institution:** PSUNV

Audience Detail View All First 1 of 1 Last

*Effective Date: 07/24/1998 *Status: Active ☒ Approved

Descript: Politically Involved Organizations

Selection Criteria View All First 1-2 of 2 Last

(Attribute Type	Oper	Valid Value	Range	Valid From	Valid To)	Logical
<input checked="" type="checkbox"/>	INVLV	=	REPACT				<input type="checkbox"/>	Or
<input type="checkbox"/>	INVLV	=	DEMACT				<input checked="" type="checkbox"/>	And

Test Search

Audience Criteria page

After you have defined attribute types, this page enables you to combine various attributes to narrow the audience.

Approved

Select to indicate that the audience criteria is approved for use. Select only if you have completed the test search (by clicking the Test Search button) and are sure that you entered the selection criteria correctly.

Important! The audience that you define appears as an Audience option when assigning an audience to an initiative or members organization, if you selected the Approved check box.

Descript (description) Enter a descriptive name for the audience. You can enter up to 60 characters in this field. This is a required field.

Selection Criteria for Audience Members

To retrieve the expected results, place your largest set of records in the first row, because the system selects that population first. Subsequent rows select populations from within the first group. For example, to select all alumni in Denver or Miami, first select all constituents with alumni as the constituent type, then select those with Denver postal codes, and then select those with Miami postal codes.

(Select if the selection statement requires parentheses to separate it from subsequent selection criteria. If more than one opening parenthesis is selected, an initial opening parenthesis and subsequent closing parenthesis are assumed as part of the selection statement. Every opening parenthesis requires a closing parenthesis.

Attribute Type Select an attribute type.

Your institution can define attribute types, but the setup must include a process table that includes the information on a constituent's record and, if appropriate, a prompt table for values.

See [Chapter 6, "Setting Up Initiatives," Defining Audiences, page 71](#).

Oper (operator) Select an operator for the selection criteria statement. Values are: =, <, <=, <>, >, and >=.

= includes all constituents with the attribute on their records.

<> includes all constituents without the attribute on their records.

Use <, <=, >, and >= to select a range, such as for an attribute of gift amount or postal code.

Valid Value If you select a single value for the attribute type, only the constituents that share that specific value are included in the audience selection. To specify a value range, select the Range check box and enter the valid from and valid to range for the attribute in the Valid From and Valid To fields.

) Select to indicate the end of a selection criteria statement.

Logical Select *(AND)* to indicate that both attribute types are required or *(OR)* to indicate that either attribute type is acceptable.

Test Search Click to run a background process that determines how many constituents would be included in the audience based on the criteria that you selected.

Note. You can create up to six rows of selection criteria.

Technical Information

These rules apply when you specify audience criteria:

- The ID or EXT_ORG_ID is selected from the first table that you specify in the Selection Criteria group box.

For example, if you selected an attribute from the Involvement table as your first row of criteria, and also included an attribute from the Ethnicity table, then your result would include anyone in the Involvement table that also matched your ethnicity type in the second row of criteria. So, all IDs come from the table associated with the first row of criteria.

- All attribute types using the *OR* operator must be grouped together with parentheses in the Selection Criteria group box.
- Whenever two different attribute types are immediately linked by *AND*, they are joined by their ID or EXT_ORG_ID.
- When you link two values with *OR*, they must be part of the same attribute.

For example, you cannot select all constituents with a constituent type of *Alumnus* or an ethnicity of *African American*. In cases such as these, create two separate audiences and assign them both to the initiative or member organization to achieve the results that you want.

- When no prompt values are available, enter dates, using the format MM/DD/CCYY.

Round decimal numbers to whole numbers. Do not enter decimal points.

Defining Initiative Goal Types

This section discusses how to define goal types for your initiative.

Page Used to Define Initiative Goal Types

Page Name	Object Name	Navigation	Usage
Goal Types	AV_GOAL_TYPE_TABLE	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Setup, Goal Type Table, Goal Types • Manage Contributor Relations, Manage Events, Setup, Goal Type Table, Goal Types • Manage Contributor Relations, Manage Memberships, Setup, Goal Type Table, Goal Types • Manage Contributor Relations, Manage Other Initiatives, Setup, Goal Type Table, Goal Types • Manage Contributor Relations, Manage Volunteers, Setup, Goal Type Table, Goal Types 	Define the types of goals that your institution tracks.

Defining Goal Types

Access the Goal Types page.

Goal Types

Goal Type: ATTN

View All First 1 of 1 Last

*Effective Date: 01/01/1900

*Status: Active

☐ Amount ☒ Number ☐ Percentage

*Description: Attendance

Short Description: Attend

Goal Types page

Examples of goal types are: attendance levels, percentage of participation, and financial goals.

Select the appropriate option to make the goal appear as an Amount, Number, or Percentage.

Defining Methods

This section discusses how to define communication vehicles that are used to distribute public relations plans.

Page Used to Define Methods

Page Name	Object Name	Navigation	Usage
Methods	AV_METHOD_TABLE	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Setup, Method Table, Methods • Manage Contributor Relations, Manage Events, Setup, Method Table, Methods • Manage Contributor Relations, Manage Memberships, Setup, Method Table, Methods • Manage Contributor Relations, Manage Other Initiatives, Setup, Method Table, Methods • Manage Contributor Relations, Manage Volunteers, Setup, Method Table, Methods 	Set up communication methods, by defining the valid communication vehicles that are used to distribute public relations plans to various audiences.

Setting Up Communication Methods

Access the Methods page.

Methods

Method: LTR

View All First 1 of 1 Last

*Effective Date: 01/01/1900

*Status: Active

*Description: Letter

Short Description: Letter

Methods page

Using Action Components for Initiative Setup

The Prospect Management feature in PeopleSoft Contributor Relations contains four action components that are useful when you set up an initiative: action types, action contact types, action status codes, and action results. Use these components with campaigns, membership initiatives, and event initiatives, as well as for prospect management.

This section discusses how to:

- Define action types for initiatives.
- Define action contact types for initiatives.
- Define action status codes for initiatives.
- Define action results for initiatives.

Defining Action Types for Initiatives

Use the Action Types page to define general types of actions taken for a particular initiative, such as an ask.

See [Chapter 5, “Setting Up Prospects,” Defining Action Types, page 61.](#)

Defining Action Contact Types for Initiatives

Use the Action Contact Types page to define the actions that your initiative staff can engage in. When you create an assignment, you select the contact type. The contact type determines whether the action will occur through a telephone call, letter, email, personal visit, and so on.

See [Chapter 5, “Setting Up Prospects,” Defining Action Contact Types, page 62.](#)

Defining Action Status Codes for Initiatives

Use the Action Status page to define the status codes that appear in the Action Status prompt dialog boxes throughout the system. Action status codes and action results are necessary for each action type and action contact type.

See [Chapter 5, “Setting Up Prospects,” Defining Action Status Codes, page 63.](#)

Defining Action Results for Initiatives

Use the Action Results page to define the values in the Result field on the page used when completing an initiative action. Action status codes and action results are necessary for each action type and action contact type.

See [Chapter 5, “Setting Up Prospects,” Defining Action Results, page 63.](#)

Defining Budget Categories

This section discusses how to define the valid categories within an initiative budget.

Page Used to Define Budget Categories

Page Name	Object Name	Navigation	Usage
Budget Table	AV_BUDGET_TABLE	<ul style="list-style-type: none">• Manage Contributor Relations, Manage Campaigns, Setup, Budget Table, Budget Table• Manage Contributor Relations, Manage Events, Setup, Budget Table, Budget Table• Manage Contributor Relations, Manage Memberships, Setup, Budget Table, Budget Table• Manage Contributor Relations, Manage Other Initiatives, Setup, Budget Table, Budget Table• Manage Contributor Relations, Manage Volunteers, Setup, Budget Table, Budget Table	Define the categories within an initiative budget.

Setting Up Budget Categories

Access the Budget Table page.

Budget Table

Budget Category: POST

View All

First

1 of 1

Last

*Effective Date:

01/01/1900

*Status:

Active

*Description:

Postage

Short Description:

Postage

+

-

Budget Table page

When creating a budget, you can allocate funds to each category that you include in an initiative budget. Budget expenses are subsequently applied to the categories within the established initiative budget.

Setting Up Appeal Information

This section discusses how to:

- Set up appeal types.
- Set up appeals.
- Set up appeal details.

Pages Used to Set Up Appeal Information

Page Name	Object Name	Navigation	Usage
Appeal Types	AV_APPEAL_TYPE_TBL	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Setup, Appeal Type Table, Appeal Types • Manage Contributor Relations, Manage Campaigns, Setup, Appeal Type Table, Appeal Types • Manage Contributor Relations, Manage Events, Setup, Appeal Type Table, Appeal Types • Manage Contributor Relations, Manage Memberships, Setup, Appeal Type Table, Appeal Types • Manage Contributor Relations, Manage Other Initiatives, Setup, Appeal Type Table, Appeal Types • Manage Contributor Relations, Manage Volunteers, Setup, Appeal Type Table, Appeal Types 	Set up appeal types, by defining the vehicles that are used to communicate an appeal or request, such as a phone call, a visit, and so on.

Page Name	Object Name	Navigation	Usage
Appeal	AV_MTVTN_TBL	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Setup, Appeal Code Table, Appeal • Manage Contributor Relations, Manage Campaigns, Setup, Appeal Code Table, Appeal • Manage Contributor Relations, Manage Events, Setup, Appeal Code Table, Appeal • Manage Contributor Relations, Manage Memberships, Setup, Appeal Code Table, Appeal • Manage Contributor Relations, Manage Other Initiatives, Setup, Appeal Code Table, Appeal • Manage Contributor Relations, Manage Volunteers, Setup, Appeal Code Table, Appeal 	Set up appeals, or specific activities that generate commitments at your institution.

Page Name	Object Name	Navigation	Usage
Appeal Detail	AV_MTVTN2_TBL	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Setup, Appeal Code Table, Appeal Detail • Manage Contributor Relations, Manage Campaigns, Setup, Appeal Code Table, Appeal Detail • Manage Contributor Relations, Manage Events, Setup, Appeal Code Table, Appeal Detail • Manage Contributor Relations, Manage Memberships, Setup, Appeal Code Table, Appeal Detail • Manage Contributor Relations, Manage Other Initiatives, Setup, Appeal Code Table, Appeal Detail • Manage Contributor Relations, Manage Volunteers, Setup, Appeal Code Table, Appeal Detail 	Set up appeal details, by defining the expected results and benefits for particular appeals.

Setting Up Appeal Types

Access the Appeal Types page.

Appeal Types

Appeal Type: INVITE

View All First 1 of 1 Last

*Effective Date: 01/01/1900

*Status: Active

*Description: Invitation

Short Description: Invitation

Appeal Types page

Setting Up Appeals

Access the Appeal page.

The screenshot shows the 'Appeal Detail' page. At the top, there are tabs for 'Appeal' and 'Appeal Detail'. Below the tabs, there are labels for 'SetID:', 'MODEL', 'Appeal Code:', and 'ALUMAN'. A navigation bar at the top right includes 'View All', 'First', '1 of 1', and 'Last'. The main form area contains the following fields:

- *Effective Date:** 01/01/1900
- *Status:** Active
- *Description:** Alumni Annual Membership Appea
- Short Description:** Alumni Ann
- Appeal Type:** Phonathon

Below the 'Appeal Type' field, there are checkboxes for different types of appeals:

- ☐ Campaign Appeal
- ☒ Membership Appeal
- ☐ Event Appeal
- ☐ Volunteer Appeal
- ☐ Other Appeal

Appeal page

Examples of appeals are: the annual phonathon, a publication insert, a capital campaign flyer, an honor roll, and so on.

Appeal Type	Select a vehicle that is used to communicate the appeal, such as phonathon, direct mail, and so on.
Campaign Appeal	Select to indicate that this appeal is a campaign appeal.
Event Appeal	Select to indicate that this appeal is an event appeal.
Membership Appeal	Select to indicate that this appeal is a membership appeal.
Volunteer Appeal	Select to indicate that this appeal is a volunteer appeal.
Other Appeal	Select to indicate that this appeal is an other appeal.

When you select one or more of these check boxes, the appeals appear as values in the Appeal field when entering an appeal code throughout the system. Campaign appeals appear in Gift and Pledge Entry. Membership and campaign appeals appear in Membership Entry.

In the previous example, ALUMAN appears only in the Membership Initiatives and Membership Entry components. When you select more than one check box, this appeal appears as a value in the Appeal field for initiatives whose type is the same as any you selected here. For example, if you also selected Campaign Appeal, the ALUMAN appeal would appear as available options in Appeal fields for all campaigns as well as in the Membership Initiatives component.

Setting Up Appeal Details

Access the Appeal Detail page.

Appeal Detail

SetID: MODEL Appeal Code: ALUMAN

View All First 1 of 1 Last

Effective Date: 01/01/1900 Status: Active

Appeal Goal: 250,000.00 USD

Start Date: 08/28/2000 Number of Pieces: 0

End Date: Appeal Budget: 0.00

View All First 1 of 1 Last

Institution	Initiative Type	Initiative
PSUNV	MEMBERSHIP	MBRPHONE

Member Phonathon

Appeal Detail page

Appeal Goal Enter the amount of revenue that you expect this appeal to generate.

Number of Pieces Enter the number of pieces or contacts that you expect to make through the appeal. For example, if your appeal involves sending a letter, this value should be the total number of letters that you expect to send.

Appeal Budget Enter the overall expense budget for the appeal.

Institution Select the institution associated with the initiative.

Initiative Type and Initiative Select each initiative type and initiative that uses the appeal.

Note. If a membership appeal is attached to initiatives, the Membership Progress page for the initiative displays the appeal and its results for that initiative.

CHAPTER 7

Setting Up Campaigns

This chapter gives an overview of campaign setup, lists prerequisites, and describes how to:

- Set up general initiative information.
- Define donor phases.
- Set up an anticipated gift table.
- Set up reporting rules.

Understanding Campaign Setup

A campaign is a type of initiative. Although all initiatives in PeopleSoft Contributor Relations share common setup pages, a campaign initiative has its own audience, resources, related initiatives, and PR plan. Some initiatives, such as campaigns, require additional setup that is specific to their purpose. The campaign-specific setup is covered in this chapter; use the chapter referenced below to learn how to set up all types of initiatives.

See Also

Chapter 6, “Setting Up Initiatives,” page 67

Prerequisites

Before you begin the process of setting up your system for managing a campaign, consider this question: what phases do your campaigns encompass? Phases are things such as leadership gifts, major gifts, and general campaign gifts.

In addition, you must consider several more questions that are prerequisites for setting up any type of initiative.

See Chapter 6, “Setting Up Initiatives,” Prerequisites, page 67.

Setting up General Initiative Information

You set up campaigns in PeopleSoft Contributor Relations by using the common initiative functionality found throughout the system. Initiatives are the common link between campaigns, events, volunteer efforts, and membership initiatives at your institution.

Before you can set up initiative information specific to a campaign, you must first create a campaign initiative for each new campaign at your institution. You can then set donor phases, create an anticipated gift table, and set up reporting rules using the additional pages that make up this portion of the system.

See [Chapter 6, “Setting Up Initiatives,” page 67](#).

Defining Donor Phases

This section discusses how to define donor phases. Once you have defined donor phases, you can then use them in the Gift Table.

Page Used to Define Donor Phases

Page Name	Object Name	Navigation	Usage
Donor Phase Table	AV_DONOR_PHASE_TBL	Manage Contributor Relations, Manage Campaigns, Setup, Donor Phase Table, Donor Phase Table	Define the valid donor phases used to create gift tables for campaigns at your institution. Gift phases identify the various gift levels you track (such as major gifts or leadership gifts).

Setting up Donor Phases

Access the Donor Phase Table page.

Donor Phase Table

Donor Phase: LG

View All First 1 of 1 Last

*Effective Date: 01/01/1900

*Status: Active

*Description: Leadership Gifts

Short Description: Leadership

Donor Phase Table page

Once you have defined donor phases, you can then use them in the Gift Table page.

Setting Up an Anticipated Gift Table

This section discusses how to develop and populate an anticipated gift table. This table relates to goal setting; use it to develop a table or *donor pyramid* outlining the number and size of gifts that you anticipate will be needed to successfully complete the campaign.

Page Used to Set Up an Anticipated Gift Table

Page Name	Object Name	Navigation	Usage
Gift Table	AV_CMPGN_GIFT_TBL	Manage Contributor Relations, Manage Campaigns, Use, Gift Table, Gift Table	Estimate the number of donors and prospects that you need at each gift level to reach your campaign goal.

Entering Gift Table Information

Access the Gift Table page.

Gift Table

Campaign: ANNFUND Annual Fund Campaign **Institution:** PSUNV

Scroll Area View All First 1 of 1 Last

*Eff Date: 11/15/2000 Status: Active

Created by: 8664 Carroll, Bruce

*Donor Phase	*Gift Level	*Nbr Donors	Nbr Prspcts	Total
Leadership Gift	1,000,000.00	5	10	500,000.00
General Camp	200,000.00	3,000	10,000	1,000,000.00

Financial Goal: 5,000,000.00 USD **Gift Table Total:** 1,500,000.00

Save Return to Search Update/Display Include History Correct History

Gift Table page

Developing and populating an anticipated gift table helps your institution outline a donor pyramid. This pyramid estimates the number of gifts at each level needed to successfully complete the campaign.

Created By

Select the ID number of the person creating the gift table. This field populates by default to the ID of the person entering the gift table information but can be overridden.

Donor Phase

Select which section of the campaign is being defined in the gift table such as *Major Gifts*, *Leadership Gifts*, *Special Gifts*, or *General Campaign*. Donor phases are defined by your institution.

Gift Level	Enter the minimum amount of a gift required at this level. Gift levels cannot be duplicated, and the amount generally decreases by donor phase when you create a table from the major gifts level down to the general campaign level.
Nbr Donors (number of donors)	Enter the number of donors needed at this gift level for the campaign to be successful. This number generally increases with lower gift levels. For example, you can project a need for five major gifts, and a need for 5,000 general campaign gifts.
Nbr Prspcts (number of prospects)	Enter the number of prospects needed at this gift level to generate the required number of donors. This number generally increases with lower gift levels and is generally greater than the number of donors.
Total	Enter the amount expected from the gift level.
Financial Goal	Displays the campaign's financial goal.
Gift Table Total	Displays the sum of the Total column.

Example

Standard Gift Table Example for a USD 25,000,000 Campaign				
Phase	Gift Level	Nbr Donors	Nbr Prosp	Total
Major Gifts	USD 2,500,000	1	5	USD 2,500,000
	1,000,000	4	10	4,000,000
	500,000	4	10	2,000,000
	250,000	6	15	1,500,000
	150,000	10	20	1,500,000
	100,000	23	46	2,300,000
Special Gifts	50,000	42	84	2,100,000
	25,000	54	110	1,350,000
	10,000	135	350	1,350,000
General Campaign	5,000	420	1,000	2,100,000
	1,000	2,100	5,000	2,100,000

Standard Gift Table Example for a USD 25,000,000 Campaign				
	50	33,000	60,000	2,200,000
Total		35,799	66,650	USD 25,000,000

Setting Up Reporting Rules

This section discusses how to define reporting rules.

Page Used to Set Up Reporting Rules

Page Name	Object Name	Navigation	Usage
Reporting Rules	AV_CAMPAIGN_TABLE	Manage Contributor Relations, Manage Campaigns, Use, Reporting Rules, Reporting Rules	<p>Define the rules used in reporting campaign activity to The Council for the Advancement and Support of Education (CASE).</p> <p>Rules can vary from campaign to campaign, but cannot vary within a single campaign. Once a campaign initiative is approved, the rules that you define cannot be altered. The approval process is used when printing the CASE campaign report.</p>

Defining Reporting Rules

Access the Reporting Rules page.

Reporting Rules

Campaign: ANNFUND Annual Fund Campaign

Institution: PSUNV

Length of Cmpgn Period

Years: 1

Months: 0

Campaign Scope

☒ Single Unit

☐ Multiple Units

☐ Comprehensive

Maximum Pledge Payment Period

☐ 1 Year

☐ 2 Years

☒ 3 Years

☐ 4 Years

☐ 5 Years

☐ Other (Please Explain)

Bequests

☐ Include Bequests

☒ Include Bequests by Exception

Life Insurance

☒ Do Not Include Life Insurance

☐ Cash Surrender Value Only

☐ Face Value/Present Value

☐ Realized Death Benefit Only

Advance-Gifts Phase in Totals

☒ Featured Objectives Only

☐ All Gifts Rcvd by Institution

Save

Return to Search

Reporting Rules page

Note. The rules that you establish on this page are used for CASE campaign reporting. Setting up these rules enables you to create your own version of these reports and in no way impacts the data that you view on inquiry pages throughout this system.

Campaign Scope

- Single Unit** Select to have only one unit (school, center) reflected in the campaign scope.
- Multiple Units** Select to have more than one but not all units reflected in the campaign scope.
- Comprehensive** Select to have all units reflected in the campaign scope.

Advance-Gifts Phase in Totals

- Featured Objectives Only** Select this option to include in campaign totals only those gifts received by your institution in support of the campaign or its related initiatives.
- All Gifts Rcvd by Institution** (all gifts received by institution) Select this option to include in campaign totals any gift received by your institution during the specified campaign period.

Important! All gifts to campaigns are counted. No featured objective totals are calculated.

Maximum Pledge Payment Period

This selection indicates your institution's preference for how long a pledge can be outstanding. When a campaign is in the post-campaign reporting phase, any pledges that have exceeded the maximum payment period and are not yet fulfilled should be subtracted from campaign totals. Select *Other* to indicate a maximum payment period greater than five years. Enter an explanation if you select *Other*. CASE recommends that no campaign period exceed seven years in duration.

Bequests

Include Bequests

Select this option to include in campaign totals only those bequests meeting the following criteria:

- The will must have a specified amount or percentage of the estate and the prospect's donor record must reflect a future value of the estate.
- A written commitment to your institution must be on file.

Include Bequests by Exception

Select this option to include in campaign totals only those bequests that are specifically selected for inclusion.

Life Insurance

Indicate your institution's preference for accepting life insurance as contributions to the campaign. If you select any option other than *Do Not Include Insurance*, life insurance that has not been realized is included in campaign totals based on the selected value.

Cash Surrender Value

Select to have the life insurance counted as a current outright gift.

Face Value/Present Value

Select to have the life insurance reported as deferred gifts.

Realized Death Benefit Only

Select to have the life insurance reported in campaign totals if they have not been reported in another campaign.

CHAPTER 8

Setting Up Membership Initiatives

This chapter gives an overview of membership initiative setup, lists prerequisites, and discusses how to:

- Set up general initiative information.
- Set up membership types.
- Set up membership categories.

Understanding Membership Setup

A membership initiative is one type of initiative. Although all initiatives in PeopleSoft Contributor Relations share common setup pages, a membership initiative has its own audience, resources, related initiatives, and PR plan. Some initiatives, such as membership initiatives, require additional setup that is specific to their purpose. The membership-specific setup is covered in this chapter; use the chapter referenced below to learn about overview information for all types of initiatives.

See Also

Chapter 6, “Setting Up Initiatives,” Understanding Initiatives, page 67

Prerequisites

Before you begin the process of setting up PeopleSoft Contributor Relations to manage membership, consider the following:

- How are setID, Record Groups, and Business Units set up at your institution? Membership types and membership categories are defined by setID. When you set up membership organizations and view information by Business Unit, the values you see depend upon the values you define for the setID and which setID you associate with a Record Group.

See Chapter 2, “Setting Up Your PeopleSoft Contributor Relations Framework,” Defining and Securing Contributor Relations Business Units and SetIDs, page 15.

- Does your institution allow gift entry to be done at the time membership dues are processed? You set this option on the Institution Installation page.
- How many days before a membership period ends do you need to roll dues over to the following year’s membership period? This option is set on the Institution Installation page.

- What type of memberships can constituents have with a member organization? Examples of membership types are life, annual, and sustaining.
- What are the various categories for membership in an organization? Examples of membership categories are single, joint, family, and complimentary.

In addition, you must consider several more questions that are prerequisites for setting up any type of initiative.

See [Chapter 6, “Setting Up Initiatives,” Prerequisites, page 67](#).

Setting up General Initiative Information

You create membership initiatives in PeopleSoft Contributor Relations by using the common initiative functionality found throughout the system. Initiatives are the common link between campaigns, events, volunteer efforts, and membership initiatives at your institution.

Before you can set up initiative information specific to a membership initiative, you must first create a membership initiative for each new drive at your institution. You can then set up the additional pages that make up this portion of the system.

See [Chapter 6, “Setting Up Initiatives,” page 67](#).

Defining Membership Types

This section discusses how to define membership types.

Page Used to Define Membership Types

Page Name	Object Name	Navigation	Usage
Membership Type	AV_MBR_TYP_PNL	Manage Contributor Relations, Manage Memberships, Setup, Membership Type, Membership Type	Define the various types of membership constituents can have with a member organization.

Setting Up Membership Types

Access the Membership Type page.

Membership Type page

Examples of membership types are *Annual*, *Sustaining*, *Life*, and so on. Use membership classifications when setting up the dues levels for a member organization.

Defining Membership Categories

This section discusses how to define membership categories.

Page Used to Define Membership Categories

Page Name	Object Name	Navigation	Usage
Membership Category	AV_MBR_CAT_PNL	Manage Contributor Relations, Manage Memberships, Setup, Membership Category, Membership Category	Define the various classifications for membership in an organization.

Setting Up Membership Categories

Access the Membership Category page.

Membership Category page

Examples of membership categories are *Single*, *Dual*, *Family*, and so on. Use membership classifications when setting up the dues levels for a member organization.

CHAPTER 9

Setting Up Volunteer Efforts

This chapter gives an overview of the setup required to manage volunteers, lists prerequisites, and describes how to:

- Set up general initiative information.
- Set up volunteer resources.
- Define basic volunteer setup data.
- Define a volunteer initiative.
- Define volunteer initiative goals.
- Define a volunteer structure.

Understanding Volunteer Setup

Volunteer efforts are associated with both volunteer initiatives and member organizations. They are set up as initiatives. Although all initiatives in PeopleSoft Contributor Relations share some common setup pages, a volunteer effort has its own audience, resources, related initiatives, and PR plan. Some initiatives, such as volunteer efforts, require additional setup that is specific to their purpose. The volunteer-specific setup is covered in this chapter; use the chapter referenced below to learn about overview information for all types of initiatives.

See Also

Chapter 6, “Setting Up Initiatives,” page 67

Prerequisites

Before you set up your system for managing volunteers, consider the following:

- What phases do your volunteer initiatives encompass?
- What specific appeals does your institution use for fundraising?

Examples of appeals are a library building or the annual alumni phonathon. Create a spreadsheet of each appeal and its type. You will use this information when you go live and as part of the conversion of gifts and pledges. You can link appeals to all types of initiatives and to gifts and pledges.

- What responsibilities does your institution assign to volunteers?

These are set up as areas of responsibility. Responsibilities are things such as programs, food, and entertainment.

- What areas of responsibility do you want to categorize?

For instance, event logistics might be an assignment type comprised of registration, entertainment, food, and program.

- What volunteer structures does your institution use to accomplish its goals?

You can set up leadership types that act as templates. When you create a new leadership structure for an initiative or member organization, you can import the volunteer structure. Examples of leadership types are *Board of Directors*, *Reunion Committee*, and *Fund Raising Team*.

In addition, you must consider several more questions that are prerequisites for setting up any type of initiative.

See [Chapter 6, “Setting Up Initiatives,” Prerequisites, page 67](#).

Common Elements Used in This Chapter

Role	Select the overall function needed for each position in the leadership structure. Your institution defines roles.
Nbr Needed (number needed)	Enter the number of volunteers needed in the role or capacity you selected.
Term Length	<p>Select the expected length of service for volunteers serving in this capacity. The values <i>Less Than One Year</i> and <i>1-15 Years</i> are delivered with your system. This field defaults to <i>Less Than One Year</i>.</p> <p>Values for this field are delivered with your system as translate values. You can modify these translate values.</p>
Sel Process (selection process)	Indicate whether volunteers are elected or appointed to the position. This field populates by default to <i>Appointed</i> .
Required	Select if the position must be filled. Two lines may be entered for each role; one for the number of required positions and one for the number of additional positions that may be filled.

Setting Up General Initiative Information

You create volunteer efforts in PeopleSoft Contributor Relations by using common initiative functionality. Initiatives are the common link between campaigns, events, volunteer efforts, and membership initiatives at your institution.

A volunteer initiative is used to manage a volunteer effort. A volunteer initiative has its own audience, resources, related initiatives, and PR plan. A volunteer initiative can be a related initiative to a campaign initiative at your institution. To set up volunteer initiatives, you can use the general initiative setup pages that make up this portion of the system.

See [Chapter 6, “Setting Up Initiatives,” page 67](#).

Setting Up Volunteer Resources

Use the Define Volunteers, Roles, and Volunteer Roles pages to create the volunteer resources you will need when managing volunteer efforts.

See Also

[Chapter 2, “Setting Up Your PeopleSoft Contributor Relations Framework,” Adding Resources, page 27](#)

Defining Basic Volunteer Setup Data

This section discusses how to:

- Define areas of responsibility.
- Define assignment types.
- Define leadership types.

Pages Used to Set Up Volunteer Data

Page Name	Object Name	Navigation	Usage
Area of Responsibility	AV_AREA_TYP_TBL	Manage Contributor Relations, Manage Volunteers, Setup, Areas of Responsibility, Area of Responsibility	Define the valid areas or spheres of accountability assigned to volunteers.
Assignment Type	AV_ASGN_TYP_TBL	Manage Contributor Relations, Manage Volunteers, Setup, Assignment Types, Assignment Type	Define the valid types of assignments that you can give volunteers.
Leadership Types	AV_LDR_TYPE_TBL	Manage Contributor Relations, Manage Volunteers, Setup, Leadership Types, Leadership Types	Define a standard structure outline that you can import when you create a new leadership structure for an initiative or a member organization.

Defining Areas of Responsibility

Access the Area of Responsibility page.

Area of Responsibility

Area of Responsibility: CNGRS

View All First 1 of 1 Last

Effective Date: 01/01/1900

Status: Active

Description: Congress Members

Short Description: Congress

Area of Responsibility page

Areas of responsibility are linked to assignment types. For example, when you define an assignment type of *Student Recruitment*, you may select *High Schools* as a valid area of responsibility for that assignment type.

The areas of responsibility you define here determine the available selections on the Volunteer Assignments 1 page, when assigning volunteers to specific tasks.

Defining Assignment Types

Access the Assignment Type page.

Assignment Type

Assignment Type: LEGIS

View All First 1 of 1 Last

Effective Date: 01/01/1900

Status: Active

Description: Legislative

Short Description: Legislativ

Area of Responsibility

Congress Members

Assignment Type page

Before you can use this page, you must define areas of responsibility on the Area of Responsibility page.

Area of Responsibility

Select the valid area of responsibility for this assignment type. Assignment types are associated with one or more areas of responsibility. For example, when you define an assignment type of *Student Recruitment* you may assign an area of responsibility called *High Schools*. You may assign a specific high school if that area of responsibility has been defined as such.

See Also

Chapter 9, “Setting Up Volunteer Efforts,” Defining Areas of Responsibility, page 102

Defining Leadership Types

Access the Leadership Types page.

Leadership Types

Leadership Type: COM

Effective Date: 01/01/1998 **Status:** Active

Description: Alumni Committee

Volunteer Structure

Role	Nbr Needed	Term Length	Sel Process	Required
Committee Membe	10	One Year	Appointed	<input type="checkbox"/>

Leadership Types page

This page defines a template structure that can be used and built upon for an initiative or a member organization.

Examples of leadership types include *Board of Directors*, *Reunion Committee*, and *Fund Raising Team*.

You can assign two lines per Role in the volunteer structure: one for a required position, and one for an additional number of positions that may be filled.

Important! Selecting the Required check box will prevent you from saving the volunteer structure without assigning a volunteer to the position.

Defining Volunteer Initiative Goals

This section discusses how to set goals or milestones for volunteer initiatives.

Note. You must have defined the initiative before you can set its goals.

Page Used to Define Volunteer Initiative Goals

Page Name	Object Name	Navigation	Usage
Volunteer Goals	AV_INTV_VOL_GOAL	Manage Contributor Relations, Manage Volunteers, Use, Volunteer Goals, Volunteer Goals	Set up intermediate goals or milestones for an initiative.

Defining Volunteer Goals

Access the Volunteer Goals page.

Volunteer Goals

Volunteer: 10YRCOMM 10 Year Reunion Committee

Institution: PSUNV

Financial Goal: 400,000.00 USD

% Particptn Goal: 60.00

Intermediate Goals/Milestones

View All First 1 of 1 Last

*Target Date	*Goal Type	Pers/Org	Audience Code	Amount/Pct/Total
01/17/2001	% Participation	Pers		55.00

Volunteer Goals page

- Financial Goal and % Particptn Goal (%)**
participation goal)

The system displays the financial goal and the participation percentage goal for the initiative. These goals are defined on the initial page used to define the initiative.
- Target Date**

Enter the date by which the goal may be reached.
- Goal Type**

Select the measurement by which you track the goal’s progress.
- Audience Code**

Enter the Audience Code to which the goal pertains. Available options include all the populations defined by your institution on the Audience page with the type of *Segmentation* for this initiative.

Defining a Volunteer Structure

Once you have created an initiative or set up a membership organization at your institution, you may want to define the volunteer structure that is necessary for the effort to succeed. Volunteer structures outline the various leadership roles for volunteers within a group and how many volunteers are needed to fill each role. In addition, they can contain subgroups or groups of volunteers that report to the initial leadership group.

This section lists prerequisites and discusses how to:

- Structure the leadership group.
- Define subgroups.

Pages Used to Define a Volunteer Structure

Page Name	Object Name	Navigation	Usage
Volunteer Structure	AV_VOL_LDR_GRP, AV_VOL_LDR_GRP_M	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Volunteers, Use, Initiative Vol Structure • Manage Contributor Relations, Manage Volunteers, Use, Member Org Vol Structure 	Define the overall leadership group for an initiative or member organization.
Sub-Groups	AV_VOL_SUB_GRP	Manage Contributor Relations, Manage Volunteers, Use, Initiative Vol Sub-Groups, Sub-Groups	Define a group of volunteers who report to the leadership group within the volunteer structure. Subgroups can be committees or specific individuals.

Structuring the Leadership Group

Access the Volunteer Structure page.

Volunteer Structure

Initiative: ANNFUND **Intv Type:** CAMPAIGN **Institution:** PSUNV

Initiative Name: Annual Fund Campaign

Volunteer Structure View All First 1 of 1 Last

Effective Date: 01/24/2001 **Status:** Active

Leadership Group: annfund group

Leadership Type: Advisory Board

Build Default Structure

Volunteer Structure Detail View All First 1 of 1 Last

*Role	Nbr Needed	Term Length	Sel Process	Required
Vice-Chairperson	1	One Year	Appointed	<input type="checkbox"/>

Volunteer Structure page

- Leadership Group** Enter the name of the leadership group or the highest level of volunteer leadership for the initiative or member organization (up to 50 characters).
- Leadership Type** Select a volunteer structure that was previously defined on the Leadership Type page.
- Build Default Structure** Click to populate the Volunteer Structure Detail group box with the template structure specified by the leadership type that you selected. You can edit the structure if you use this choice.

If you do not use the default structure, make selections and enter values in the Role, Nbr Needed, Term Length, Sel Process, and Required areas of the page.

Important! Selecting the Required check box will prevent you from saving the volunteer structure without assigning a volunteer to the position.

Defining Subgroups

Access the Sub-Groups page.

Sub-Groups

Initiative: CAMP2000 **Intv Type:** CAMPAIGN **Institution:** PSUNV

Initiative Name: Campaign 2000

Effective Date: 11/08/2000 **Status:** Active

Vol Sub-Group: Phoenix Campaign Volunteers

Leadership Type: Advisory Board

Sub-Group Structure View All First 1 of 1 Last

*Role	Nbr Needed	Term Length	Sel Process	Required		
Vice-Chairperson	1	One Year	Appointed	<input type="checkbox"/>		

Sub-Groups page

Sub-groups are committees or groups of individuals that report directly to the leadership group.

Vol Sub-Group (volunteer sub-group) Enter a name for the volunteer sub-group (up to 50 characters).

Leadership Type Select a volunteer structure that was previously defined on the Leadership Type page.

Build Default Structure

Click to populate the Sub-Group Structure group box with the structure template specified by the leadership type that you selected. You can edit the structure if you use this choice.

If you do not use the default structure, make selections and enter values in the Role, Nbr Needed, Term Length, Sel Process, and Required areas of the page.

Important! Selecting the Required check box will prevent you from saving the volunteer structure without assigning a volunteer to the position.

CHAPTER 10

Setting Up Event Initiatives

This chapter gives an overview of event initiative setup, lists prerequisites, and describes how to:

- Set up general initiative information.
- Set up event types.

Understanding Event Initiative Setup

An event initiative is a combination of processes. Although all initiatives in PeopleSoft Contributor Relations share some common setup pages, an event initiative has its own audience, resources, related initiatives, and PR plan. Some initiatives, such as events, require additional setup that is specific to their purpose. The event-specific setup is covered in this chapter; use the chapter referenced below to learn about setting up all types of initiatives.

See Also

Chapter 6, “Setting Up Initiatives,” page 67

Prerequisites

Before you begin the process of setting up your system for managing events, consider this question: what phases do your event initiatives encompass?

In addition, you must consider several more questions that are prerequisites for setting up any type of initiative.

See Chapter 6, “Setting Up Initiatives,” Prerequisites, page 67.

Setting up General Initiative Information

You create events in PeopleSoft Contributor Relations by using the common initiative functionality found throughout the system. Initiatives are the common link between campaigns, events, volunteer efforts, and membership initiatives at your institution.

Before you can set up initiative information specific to an event, you must first create an event initiative for each new event at your institution. You can then use the additional pages that make up this portion of the system.

See [Chapter 6, “Setting Up Initiatives,” page 67](#).

Setting Up Event Types

Access the Event Type Table page in PeopleSoft Campus Community to define the specific types of events at your institution, and to specify the event types you want to use as defaults in your system.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Setting Up Events,” Understanding Events

CHAPTER 11

Setting Up Other Initiatives

This chapter gives an overview of other initiative setup, lists prerequisites, and describes how to set up general initiative information.

Understanding Other Initiative Setup

An other initiative is a type of initiative that does not fall within the boundaries of a campaign, event initiative, membership initiative, or volunteer effort. Although all initiatives in PeopleSoft Contributor Relations share some common setup pages, an other initiative has its own audience, resources, related initiatives, and PR plan. Use the chapter referenced below to learn about how to set up all types of initiatives.

See Also

Chapter 6, “Setting Up Initiatives,” Understanding Initiatives, page 67

Prerequisites

You must consider several questions that are prerequisites for setting up any type of initiative.

See Chapter 6, “Setting Up Initiatives,” Prerequisites, page 67.

CHAPTER 12

Setting Up Commitment Management

This chapter lists prerequisites for the gift and pledge process and discusses how to:

- Define gift types.
- Define tender types.
- Define designation types.
- Define matching gift types.
- Define designation funds.
- Define recognition types.
- Define adjustment reasons.
- Prepare for session posting.
- Prepare for acknowledgement letters.
- Define acknowledgement rules.
- Define an organization's matching gift rules.
- Define giving clubs.
- Set up credit card processing.
- Set up self-service online giving and pledges.
- Set up integration with PeopleSoft Financials 8.4.

Prerequisites

Before you begin the process of setting up your system for gift and pledge processing, consider the following:

- How are setIDs, record groups, and business units set up at your institution?

Designation types, designation funds, tender types, and appeals are defined by setID. When you enter transactions and view information by Business Unit, the available values depend upon the values you define for the setID and which setID you associate with the Record Group for the business unit.

See PeopleSoft PeopleTools documentation

- What types of pledges are most common at your institution?

What pledge reminder scheme do these pledges typically have? Set up the most common reminder schedule as your default.

- Does your institution feed certain key pledges to the General Ledger during capital campaigns?

You can elect whether or not to allow feedable pledges using the Contributor Relations Installation page.

- Do you enable your gift processors to override pledge details?

If you enable your gift processors to override pledge details such as designation funds during the processing of pledge payments, you can set this up as the default using the Contributor Relations Installation page.

- For what reasons does your gift processing staff adjust gifts and pledges?

These reasons are set up in the system as adjustment reasons.

- How do you plan to set up item types?

Since item types are shared with PeopleSoft Student Financials, your fundraising department should request a range of item types to use. If your institution uses designation numbers, a convenient way to keep item types and designation funds in sync is to begin the item types with your department's range and end them with the corresponding designation fund numbers.

- What are the ways your institution accepts gift payments?

These are set up in the system as tender types, such as cash, check, and credit card.

- How do you want to categorize designation funds?

Designation types are convenient ways of grouping designation funds for reporting purposes. Create a spreadsheet of all the categories of designation funds to use as designation types.

- What types of acknowledgements do you want to produce?

Create a spreadsheet of all the types of acknowledgements your institution sends to donors. Set these up as letter codes. Clone delivered letters for your gift receipt and for each of your acknowledgement letters. Also, create an Event ID for each acknowledgement type.

Your acknowledgement scheme must be carefully thought through to take advantage of all that the PeopleSoft Contributor Relations system has to offer. You create standard default acknowledgement rules on the Acknowledgement Setup pages. In addition, you can set up special acknowledgements rules for each designation and for giving clubs.

- How do you want to assign staff roles?

All staff members who process gifts and pledges must be set up as Gift Entry personnel. All staff members who have supervisory responsibility for gift and pledge entry must be set up as Gift/Pledge Supervisors. All staff members who add giving club membership manually must be set up as Giving Club Administrators.

Defining Gift Types

This section discusses how to set up gift types at your institution. Gift types are used on the Gift Entry and Gift Adjustment pages.

Page Used to Define Gift Types

Page Name	Object Name	Navigation	Usage
Gift Types	AV_GFT_TYPE_TBL	Manage Contributor Relations, Enter Commitments, Setup, Gift Types, Gift Types	Set up the various types of gifts donors make to your institution.

Setting Up Gift Types

Access the Gift Types page.

The screenshot shows the 'Gift Types' page in a web browser. At the top, there's a breadcrumb 'Gift Types'. Below it, 'Gift Type: GIFT' is displayed. A blue header bar reads 'Gift Type Detail' with navigation links 'View All', 'First', '1 of 1', and 'Last'. The main form contains several fields: 'Effective Date' with a date picker set to 01/01/1900, 'Status' with a dropdown menu set to 'Active', '*Description' with a text box containing 'Gift', 'Short Description' with a text box containing 'Gift', and '*CAE Type' with a dropdown menu set to 'Gift'. There are also '+' and '-' buttons on the right side of the form.

Gift Types page

The following values are required in the GIFT_TYPE field that resides in the AV_GFT_TYPE_TBL table:

Code	Value
GIFT	Gift
MG	Matching Gift
GIK	Gift-In-Kind
PP	Pledge Payment

CAE Type

Select the gift type you are defining. CAE types are established by the Council for Aid to Education and are used in producing the CAE report.

Gift types of *Gift In Kind*, that do not have a *Real Estate* tender type assigned to them, are reported in Part IV of the CAE report (II, C2a, Number and dollar value of company products).

See Also

Appendix A, “PeopleSoft Contributor Relations Reports,” AVPCAE, GFTINC, GFTINCII, GFTINCIV – CAE Gift Income Report, page 580

Defining Tender Types

This section discusses how to set up tender types at your institution.

Page Used to Define Tender Types

Page Name	Object Name	Navigation	Usage
Tender Types	AV_GFT_TNDR_TBL	Manage Contributor Relations, Enter Commitments, Setup, Tender Types, Tender Types	Set up the monetary forms in which gifts are received. Examples are cash, credit card, check, and so on.

Setting Up Tender Types

Access the Tender Types page.

The screenshot displays the 'Tender Types' page. At the top, there's a breadcrumb 'Tender Types'. Below it, 'SetID:' is set to 'MODEL' and 'Tender Type:' is set to 'CHK'. A blue header bar contains 'Tender Type' and navigation links: 'View All', 'First', '1 of 1', and 'Last'. The main form area includes the following fields:

- *Effective Date:** 01/01/1900 (with a calendar icon)
- Status:** Active (dropdown menu)
- Description:** Check (text field)
- Short Description:** Check (text field)
- Special Fields:** Check (dropdown menu)
- Item Type:** 00000100005 (with a magnifying glass icon) and the text 'Tender - Check'.
- ☐ CAE Real Estate

On the right side of the form, there are '+' and '-' buttons.

Tender Types page

Special Fields

Select *Credit Card* or *Check* if additional fields should appear when the tender type you are entering is selected during transaction entry. If you select credit card, fields for the card type, number, holder, and expiration date display. If you select check, a check number field displays.

Item Type

Enter the item type to be used when processing a transaction with this tender to your financial system.

CAE Real Estate

Select if the tender type represents a property gift that you want included in the Council for Aid to Education (CAE) report. When selected, this check box separates gifts-in-kind such as equipment and applications from other property such as real estate. Gifts of property are reported in Part IV of the CAE report (II, C2b, Number and dollar value of other property).

See Also

Appendix A, “PeopleSoft Contributor Relations Reports,” AVPCAE, GFTINC, GFTINCII, GFTINCIV – CAE Gift Income Report, page 580

Defining Designation Types

This section discusses how to set up valid designation types.

Page Used to Define Designation Types

Page Name	Object Name	Navigation	Usage
Designation Types	AV_INST_TYP_TBL	Manage Contributor Relations, Enter Commitments, Setup, Designation Types, Designation Types	Set up the valid designation types for a setID.

Setting Up Designation Types

Access the Designation Types page.

Designation Types

SetID: MODEL Designation Type: ATH

View All First 1 of 1 Last

*Effective Date: 01/01/1900

*Status: Active

*Description: Athletics

Short Description: Athletics

Designation Types page

Designations are the projects, funds, or areas at your institution that receive appropriation from gift transactions. Designations are set up as allocation accounts that are linked to specific item types in your institution’s financial structure.

When you define a designation fund you can specify the type of designation that this particular fund is. Examples of designation types are *Graduate School*, *Law School*, and so on. Designation types are used for reporting on designations that share a designation type. Designation types may vary from the standard CASE, FASB, and Matching Gift types.

Important! Use a designation type of *None* for those designations that do not match any of the other designation types.

Defining Matching Gift Types for Designations

This section discusses how to set up valid matching gift types.

Page Used to Define Matching Gift Types for Designations

Page Name	Object Name	Navigation	Usage
Matching Gift Types	AV_MTCH_GFT_TBL	Manage Contributor Relations, Enter Commitments, Setup, Matching Gift Types, Matching Gift Types	Set up the valid matching gift types at your institution.

Setting Up Matching Gift Types

Access the Matching Gift Types page.

Matching Gift Types

Matching Gift Type: ATHSCH

Matching Gift Detail

View All First 1 of 1 Last

Effective Date: 01/01/1900

Status: Active

Description: Athletic Scholarships

Short Description: Ath schs

Matching Gift Types page

The values you define on this page are used when defining designation funds. When you define a designation fund you can specify the types of matching gifts that matching gift companies do not match.

Matching gift types that are not matched by matching gift companies are found in the CASE Matching Gift Details book.

The following values are delivered based on CASE matching gift rules:

For Designations	For Gift Types
Athletic activities/program	Premiums for life insurance policies

For Designations	For Gift Types
Athletic scholarships	Deferred gifts
Athletic building projects	Gifts-in-kind
Non-athletic scholarships	Gifts of securities
Non-athletic building funds	Volunteer time

Defining Designation Funds

The Designation Funds and Designation Funds 2 pages help you set up the specific allocation accounts for commitments made to your institution. Designations are the projects, funds, or areas at your institution that receive appropriation from gift transactions. Designations are linked to specific item types in your institution's financial structure. Designation Funds are defined for each setID at your institution.

This section discusses how to:

- Begin setting up designation funds.
- Complete designation funds setup.

Pages Used to Define Designation Funds

Page Name	Object Name	Navigation	Usage
Designation Funds	AV_DESIGNATION	Manage Contributor Relations, Enter Commitments, Setup, Designation Funds, Designation Funds	Set up designations to receive gifts from donors, and assign designation categories used when generating the CAE report.
Designation Funds 2	AV_DESIGNATION2	Manage Contributor Relations, Enter Commitments, Setup, Designation Funds, Designation Funds 2	Set up default acknowledgement, tribute, and original donor values used during gift entry.

Beginning Designation Funds Setup

Access the Designation Funds page.

Designation Funds Designation Funds 2

SetID: MODEL Designation: ANNUALFUND

View All First 1 of 1 Last

*Designation Name: Annual Fund *Effective Date: 01/01/1900

*CASE Type: Current Unrestricted *Status: Active

*CASE Purpose: Academic Divisions

*FASB Type: Unrestricted

*Match Gift Type:

*Designation Type:

*Item Type: 00000100002 Annual Fund

Institution: PSUNV

Responsible Person:

Comment:

Designation Funds page

Designation Name Enter the full name of the designation fund.

CASE Type Select the specific purpose of the designation fund as defined by the Council for the Advancement and Support of Education (CASE). Valid CASE types are *Current Restricted*, *Current Unrestricted*, *Endowment & Similar*, *Loan Funds*, *Non-Gift*, and *Plant Funds*.

CASE type values are delivered with your system as translate values and are used when generating the CAE report. Do not modify these translate values in any way. Any modifications to these values require a substantial programming effort.

Note. This field supports Part IA and Part II of the CAE report.

CASE Purpose Select the specific utilization category of the designation fund as defined by the Council for the Advancement and Support of Education (CASE). Valid CASE purposes are *Academic Divisions*, *Athletics*, *Chairs*, *Equipment*, *Faculty/Staff Compensation*, *Financial Aid*, *Land & Buildings*, *Library*, *Non-Gift*, *Other Restricted Purpose*, *Prizes*, *Public Service & Ext.*, *Special Programs*, *Student Projects*, *Research* and *Unrestricted*.

CASE purpose values are delivered with your system as translate values and are used when generating the CAE report. Do not modify these translate values in any way. Any modifications to these values will require a substantial programming effort.

Note. This field supports Part II of the CAE report.

FASB Type Select the accounting category for the designation fund as defined by the Financial Accounting Standards Board (FASB). This value is used when generating the CAE report.

	<hr/> Note. This field supports Part I of the CAE report.
Matching Gift Type (matching gift type)	<p>Select the category to determine if matching gift companies match gifts to this designation. The CASE Matching Gift Details book provides the following eligibility categories: <i>Athletic Activities Programs</i>, <i>Athletic Building Funds</i>, <i>Athletic Scholarships</i>, <i>Non Athletic Building Funds</i>, and <i>Non Athletic Scholarships</i>.</p> <hr/> <p>Note. Define a matching gift type of <i>None</i> for those gifts that do not match any of the other matching gift types, because the field is required and cannot be left blank. <i>None</i> indicates that matching gift companies put no restrictions on this designation.</p>
Designation Type	<p>Select the type of account the designation applies to. Designation types are defined by your institution and can be used for running reports on various account groupings. Examples of designation types are <i>Law School</i>, <i>Athletic Accounts</i>, and so on.</p> <hr/> <p>Note. Include a designation type of <i>None</i> for those designations that do not match any of the other designation types, because the field is required and cannot be left blank. Designation types are defined by your institution and assist in categorizing accounts for internal purposes.</p>
Item Type	Enter the specific reference to the chart of accounts within PeopleSoft Student Financials.
Responsible Person	Enter the staff member responsible for managing this designation fund.

See Also

Appendix A, “PeopleSoft Contributor Relations Reports,” AVPCAE, GFTINC, GFTINCII, GFTINCIV – CAE Gift Income Report, page 580

Completing Designation Funds Setup

Access the Designation Funds 2 page.

Designation Funds Designation Funds 2

SetID: MODEL **Designation:** ANNUALFUND Annual Fund

View All First 1 of 1 Last

Campus: MAIN Main Hacienda Campus **Institution:** PSUNV

Acad Org: CMILENGR Civil Engineering

Department: ASPSUNV Associated Students PSUNV

Acknowledgments

Event ID **Role**

Gift: **Pledge:**

Tribute Recipient View All First 1 of 1 Last

ID	Name	+	-
0039996	Prince, Nathan		

Original Donor View All First 1 of 1 Last

ID Type:	*ID	Name	+	-
Org	000010090	District Council 37 Afscme		

Designation Funds 2 page

Other Page Elements

Campus, Acad Org (academic organization), and **Department** Select the value associated with this designation. The valid departments include those associated with the setID you select for this designation.

Acknowledgements

You are not required to enter an Event ID or Role. However, you may only enter one or the other. The system creates an acknowledgement communication record for a donor for each designation to which a gift is allocated if an event ID is entered in these fields.

Event ID Select the event ID associated with the letter code to use for gifts and pledges made to this designation. To use the event IDs for acknowledgement letters selected on the acknowledgement setup pages rather than a specific letter for this designation, leave this field blank.

Role If applicable, select the role for the type of person who should receive notification of the acknowledgement. Role codes are descriptions of undertakings people take on at your institution. Examples are *Prospect Manager*, *Campaign Manager*, *Gift and Pledge Supervisor*, and so on. To use the acknowledgement role selected on the acknowledgement setup pages rather than a specific role for this designation, leave this field blank.

Tribute Recipient

ID and Name If the designation fund is set up in honor or in memory of a person, select the ID and name of the tribute recipient for this designation fund. If the person does not have an ID in the system, type the person's name.

Note. The system does not make sure you do not enter a person's name or ID as a tribute recipient on more than one line. Be careful not to enter duplicate values.

Original Donor

ID Type

Select whether the original donor is a *Person* or *Org* (organization).

ID and Name

Enter the ID of the original donor to the designation fund. The person or organization must have an ID in the system. The name appears to the right.

Note. To designate an organization as an original donor, enter the page in Correct History mode.

Defining Recognition Types

This section discusses how to set up credit recognition types.

Page Used to Define Recognition Types

Page Name	Object Name	Navigation	Usage
Recognition Types	AV_RCG_TYPE_TBL	Manage Contributor Relations, Enter Commitments, Setup, Recognition Types, Recognition Types	Set up the various types of credit recognition that donors can receive when making commitments.

Setting Up Recognition Types

Access the Recognition Types page. Recognition types are used during the gift and pledge entry acknowledgement processes to recognize donors who made commitments to the institution.

Recognition Types

Recognition Type: H

Recognition Type Detail View All First 1 of 1 Last

Effective Date: 01/01/1900

Status: Active

Description: Hard Credit

Short Description: Hard

Recognition Types page

Note. When the system generates acknowledgement letters for gifts, it always acknowledges hard credit recognition first. If the Soft Credits check box is selected on the Institution Installation 2 page, the system also looks at soft credit recognition to determine whether an acknowledgement should be generated.

The following value is required in the RECOGNITION_TYPE field that resides in the AV_RCG_TYPE_TBL table:

Recognition Type Required Values	
Code	Value
H	Hard Credit

Defining Adjustment Reasons

This section discusses how to set up valid reasons for transaction adjustment.

Page Used to Define Adjustment Reasons

Page Name	Object Name	Navigation	Usage
Adjustment Reasons	AV_ADJ_REASON_TBL	Manage Contributor Relations, Enter Commitments, Setup, Adjustment Reasons, Adjustment Reasons	Define your institution's valid reasons for making an adjustment to a commitment transaction.

Setting Up Adjustment Reasons

Access the Adjustment Reasons page. The adjustment reasons you define here become available for selection in the Reason field on the Gift Adjustment and Pledge Adjustment pages.

Adjustment Reasons

Reason Code: ERR

Adjustment Reason
View All First 1 of 1 Last

Effective Date: 01/01/1900

Status: Active

*Description: Data entry error

Short Description: Error

Adjustment Reasons page

Examples of common adjustment reasons are *Data Entry Error*, *Donor Request*, and so on.

Preparing for Session Posting

Before processing transactions to your institution's financial system, you must set up designations, item types, and journal sets properly.

When you set up institution defaults using the Institution Installation page, you select the setID used to link to PeopleSoft Student Financials. This setID is used to retrieve detail calendars and item types from PeopleSoft Student Financials.

Designations are, in simple terms, a representation of accounts or fund codes at your institution. When a gift or pledge payment is applied to a designation, that designation updates the actual account associated with it through the GL Interface.

Designations are tied to an item type in PeopleSoft Student Financials. You define chartfields and item types using the PeopleSoft Student Financials system, then associate them with designations in PeopleSoft Contributor Relations when you define designation funds using the Designation Funds page.

Using the Budget Period Page

Access the Budget Period page to define the chart field budget periods used by your institution.

Setting Up Item Types

Item types are classifications of charges and credits. Specifying item types differentiates the various debits and credits when you apply them to an account. Your institution's policies govern how item types are defined. The item type also contains the General Ledger Interface information, which is used to transmit the transaction from Contributor Relations to your General Ledger system.

An item type may have multiple journal sets. Journal sets enable you to generate a set of balanced entries into your journals.

Journal sets may be defined for Gift, Pledge, Pledge Payment, or Tender/Clearing account transactions. Each of these journal sets requires different debit/credit definitions. For PeopleSoft Contributor Relations, journal set fields must be defined with a specific value based on the type of transaction for which you are setting up the GL Interface. If these values are not as follows, the posting process does not work:

Journal Set	Data Entry Type	DB/CR Indicator
0	Tender and AP Clearing Account	Always Debit to tender or clearing account
1	Gift	Always Credit to designation account

Journal Set	Data Entry Type	DB/CR Indicator
2	Pledge	Always Debit to accounts receivable/Credit to designation account
3	Pledge Payment	Always Credit to accounts receivable

For example, when you enter a gift transaction in the system, you select a tender type that is tied to an item type with a journal set of 0. This represents the debit side of the transaction. Then you select one or more designations that are each tied to an item type with a journal set of 1 (Gift) that specifies the credit side of the transaction.

If your institution plans to feed pledges, a pledge transaction has a debit to accounts receivable with a journal set of 2 and a credit to a designation account with a journal set of 2 (requiring two rows in the GL interface record).

If your institution plans to feed pledges, a pledge payment has a credit to accounts receivable with a journal set of 3. The tender entered during gift entry provides the debit side of the transaction.

Note. If you do not intend to feed pledges to your financial system, you do not need to create journal sets 2 and 3 for PeopleSoft Contributor Relations item types. In this instance, an item type for a designation would have only a single row with a journal set of 1 and Credit in the DB/CR field.

See Also

Chapter 23, “Processing Commitments and Analyzing Giving History.” Processing and Posting Sessions, page 427

Completing the Item Type Initial Setup Page

Use the Initial Setup page to begin the process of setting up item types at your institution.

Make sure the Contributor Relations Classification is selected. This selection enables the specific processing of item types as required by the system and enables the GL Interface page to save with journal sets that do not have both a debit and credit.

Select the G/L Interface Required check box to indicate that both a credit and debit side of each transaction are required.

See Also

PeopleSoft 8 SPI Student Financials PeopleBook, “Completing PeopleSoft Student Financials General Setup,” Setting Up Item Types and Item Type Groups

Defining a GL Interface

Use the GL Interface page to map your item type to a specific General Ledger account. When the General Ledger interface process is run the transactions for the item type are entered in the GL Accounts you define on this page.

Enter an Effective Date. You must insert a new effective-dated row to change the budget period associated with this item type. The effective date must fall on or after the effective date for the associated budget period.

Note. To change the setID for which values are displaying on this page, select *PeopleTools, Utilities, Use, Table Set Control, Table Set Record Group Controls*. Change the *setID* for FS-05 to the *setID* for which to view values.

The Term and Session fields are unavailable for input when the item type classification is set to Contributor Relations.

See Also

PeopleSoft 8 SP1 Student Financials PeopleBook, “Using GL Interface Processing,” Creating Accounting Entries Using the GL Interface Process

Defining Journal Entry Definitions

Use the Accounting Entry Definition page to specify the record and field names that the system uses to extract data from the accounting entry tables when it creates the journal header and lines.

Accounting Entry

Record Enter *AV_ACCTG_LN* as the accounting entry record name for the accounting entry table the Journal Generator uses to create the journals.

Record Update Choose *AV_ACCTG_LN* as the record update name for the accounting entry table that the Journal Generator updates with journal information after it creates the journal.

Field Names

Enter the following field names to identify the columns in the accounting entry table that the Journal Generator uses to create the journal.

Field Label	Enter this Value
Monetary Amount	MONETARY_AMOUNT
Foreign Amount	FOREIGN_AMOUNT
Statistical Amount	STATISTIC_AMOUNT
Journal Ref	JRNL_LN_REF
Journal Descr	LINE_DESCR

System Source Select *JrnlGen-AV* as the application system source for the accounting entry definition. The journal generator uses this information to derive the prompt table for the application business units when defining the request and to format the system source field on the journal header. System source values are delivered with your system.

Chartfield Mapping

In the chartfield mapping columns, identify the accounting entry chartfield names that map directly to the General Ledger chartfield names. This provides more flexibility when integrating different financial applications. The Journal Generator uses the chartfields that are listed when summarizing the accounting entries and creating journals. The chartfields that are not listed have a blank value in the newly created journals.

See Also

PeopleSoft 8 SPI Student Financials PeopleBook, “Setting Up GL Interface Processing”

Defining a Journal Source

Use the Journal Source component to set up the identifier for the journal header line.

The system uses the journal source as the identifier on the journal header line. You use the journal source ID when you set up journal templates and journal summarization options. You define the journal source and the journal error processing, multicurrency, and approval options for that source on the Journal Source component.

You must set up a journal source for PeopleSoft Contributor Relations.

See Also

PeopleSoft 8 SPI Student Financials PeopleBook, “Setting Up GL Interface Processing”

Defining Journal Generator Template Defaults

Use the Defaults page to set up defaults that determine how Journal Generator summarizes accounting entries and creates journals.

You must set up a journal generator template for PeopleSoft Contributor Relations.

Source	Enter the Source that you created for Contributor Relations on the Define Journal Source page. This identifies the originating responsibility for the journal entries. It also determines the foreign currencies per journal.
---------------	---

See Also

PeopleSoft 8 SPI Student Financials PeopleBook, “Setting Up GL Interface Processing,” Reviewing Setup Table Data

Preparing for Acknowledgement Letters and Receipts

There are various pages in the system that effect the setup of acknowledgement letter processing.

- On the Institution Installation 2 page, you select an Event ID to identify your institution’s default receipt. You also enter numbers to represent the priority the system looks at when identifying which acknowledgment letter to send to a donor. Finally, you select check boxes to indicate whether to acknowledge soft credits, adjusted gifts, and adjusted pledges.

- On the Recognition Types page, the system has included code to ensure that hard credits are always given top priority when determining what to acknowledge. If you select the Soft Credits check box on the Institution Installation 2 page to acknowledge soft credit, that soft credit is only acknowledged when no hard credit exists for the donor on the gift.
- On the Designation Funds 2 page, you can select an Event ID or a role to associate with a specific designation fund. When the acknowledgement process run, it checks to see if the commitment has been allocated to a designation fund that requires a separate acknowledgement. If so, it creates a communications record for the letter or assigns the acknowledgement to the ID of the person with the role.
- On the Acknowledgement Setup pages, you define the rules that determine what acknowledgement letter is sent to a donor in a particular situation. The five items you prioritized on the Institution Installation 2 page are now assigned Event ID's or roles.

Defining Acknowledgement Rules

This section discusses how to set up the rules that determine which acknowledgement letter is sent to a donor in a particular situation.

The rules you set up here enable the system to determine which one letter a donor should receive, or whether the acknowledgement should be assigned to a role so a customized acknowledgement can be produced. Acknowledgements assigned to a role can be viewed on the Acknowledgement List page for the resources assigned to that role.

You can set the priority in which the system looks at these rules using the Institution Installation 2 page.

Common Elements Used in This Section

No Receipt	Select this check box if you do not want the donor to receive a receipt in the situation.
Event ID	Identify the event associated with the letter to send in the situation. If you do not select an Event ID, no acknowledgement is sent.
Role	Select the role for the type of person at your institution responsible for the action. Roles are descriptions of undertakings people take on at your institution. If you select a role, any acknowledgements of this type are assigned to that role. Customized acknowledgements can also be produced.

Pages Used to Define Acknowledgement Rules

Page Name	Object Name	Navigation	Usage
Acknowledgement Setup1	AV_ACKNLDG_SETUP	Design Student Administration, Define Contributor Relations, Setup, Acknowledgement Setup, Acknowledgement Setup1	Set up acknowledgement rules based on service indicators and gift amounts.
Acknowledgement Setup2	AV_ACKNLDG_SETUP2	Design Student Administration, Define Contributor Relations, Setup, Acknowledgement Setup, Acknowledgement Setup2	Set up acknowledgement rules based on transaction adjustments, gifts in honor of a person, and gifts in memory of a person.
Acknowledgement Setup3	AV_ACKNLDG_SETUP3	Design Student Administration, Define Contributor Relations, Setup, Acknowledgement Setup, Acknowledgement Setup3	Set up acknowledgement rules based on deceased individuals and anonymous donors.

Setting Up Acknowledgements

Access the Acknowledgement Setup1 page.

Acknowledgement Setup1 **Acknowledgement Setup2** **Acknowledgement Setup3**

Institution: PSUNV PeopleSoft University

Service Indicator View All First 1-3 of 4 Last

Service Indicator	*Type	Priority	No Receipt	Event ID	Role
Planned Giving	Gift	3	<input type="checkbox"/>		
President	Gift	1	<input type="checkbox"/>		President's Office
Planned Giving	Pledge	4	<input type="checkbox"/>		

Gift Amount View All First 1-3 of 12 Last

From Amount	To Amount	*Type	No Receipt	Event ID	Role
100.00	999.99	Gift	<input type="checkbox"/>		
100.00	999.99	Pledge	<input type="checkbox"/>		
1,000.00	9,999.99	Gift	<input type="checkbox"/>		

Acknowledgement Setup1 page

Service Indicator

Service Indicator and Type Select a service indicator and an acknowledgement type. For example, you can select *Major Donor* and *Gift* from the fields to set up rules for acknowledging major donors' gifts.

Priority Enter a service indicator priority. The value you enter determines the priority used to select which acknowledgement a donor receives. For example,

say you indicate *President* as priority 1 and *Planned Giving* as priority 2. If a donor is both in the president’s club and a planned giving donor and these service indicators are attached to the donor’s record, the letter defined for *President* is the one the donor receives.

Gift Amount

From Amount, To Amount, and Commitment Type Enter an amount range and a commitment type. The amounts you enter define the monetary range for which to set up acknowledgement rules, and the commitment type indicates whether the rules apply to *gifts* or *pledges*.

Continuing Acknowledgement Setup

Access the Acknowledgement Setup2 page.

Acknowledgement Setup1

Acknowledgement Setup2

Acknowledgement Setup3

Institution: PSUNV PeopleSoft University

Adjustments

	No	Receipt	Event ID	Role
Gift:	<input type="checkbox"/>		<input type="text"/>	Acknowledgement Coordina
Pledge:			<input type="text"/>	Acknowledgement Coordina

In Honor

	No	Receipt	Event ID	Role
Gift:	<input type="checkbox"/>		<input type="text"/>	
Pledge:			<input type="text"/>	

In Memory

	No	Receipt	Event ID	Role
Gift:	<input type="checkbox"/>		<input type="text"/>	
Pledge:			<input type="text"/>	

Acknowledgement Setup2 page


Completing Acknowledgement Setup

Access the Acknowledgement Setup3 page.

Acknowledgement Setup1 **Acknowledgement Setup2** Acknowledgement Setup3

Institution: PSUNV PeopleSoft University

Deceased

Event ID  **Role**

Anonymous

Role

Acknowledgement Setup3 page

All anonymous acknowledgements are customized and do not have a standard letter generation option.

Defining an Organization's Matching Gift Rules

The Matching Rules component enables you to define the matching gift rules for an organization. You can maintain information about minimum match amounts and match ratios, the designations for which gifts can be matched, the annual matching gift budget, required information and contacts, and any matching gift restrictions the organization has.

This section discusses how to:

- Set up matching gift rules.
- Set up matching gift restrictions.
- Set up required information for matching gifts.

Pages Used to Define Organization Matching Gift Rules

Page Name	Object Name	Navigation	Usage
Rules	AV_MTCH_ORG_RULES	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Use, Matching Rules, Rules • Manage Contributor Relations, Enter Commitments, Workset, Matching Rules, Rules • Manage Contributor Relations, Manage Organizations, Use, Matching Rules, Rules 	Begin entering information about an organization's match amount, ratio, and budget rules.
Restrictions	AV_MTCH_ORG_RULES2	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Use, Matching Rules, Restrictions • Manage Contributor Relations, Enter Commitments, Workset, Matching Rules, Restrictions • Manage Contributor Relations, Manage Organizations, Use, Matching Rules, Restrictions 	Track information about the eligible and ineligible designation type, gift types, alumni statuses, and employee statuses for an organization's matching gift program.
Rqd Info/Contacts	AV_MTCH_ORG_RULES3	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Use, Matching Rules, Rqd Info/Contacts • Manage Contributor Relations, Enter Commitments, Workset, Matching Rules, Rqd Info/Contacts • Manage Contributor Relations, Manage Organizations, Use, Matching Rules, Rqd Info/Contacts 	Indicate what information is required by the organization before matching a gift, and to maintain information about the contact people at the organization.

Setting Up Matching Gift Rules

Access the Rules page.

Rules
Restrictions
Rqd Info/Contacts

Ford Motor Company
ID: AV1000

Min Amt: 0.00 USD
MG Designation Type: Any Eligible
*Receipts: Periodically
Distribution Schedule: Continuously
Distribution Date:
Deadline Date:

Last Modification Date: 09/20/2000

Annual Matching Gift Budget
Overall Total:
Donor/Institution Total:
Institution Total:
Donor Total:

☒ Payroll Eligibility
☒ Duplicate Match

Match Detail
View All
First
1-2 of 2
Last

Ratio	Min Amt	Max Amt
1.00 : 1.00	10.00	25,000.00
0.50 : 1.00	25,001.00	50,000.00

Rules page

Min Amt (minimum amount)

Enter a minimum amount for gifts that the organization matches. The organization only matches gifts that are equal to or greater than the amount in this field. If the gift meets this amount, the matching gift program then considers if it is given to an appropriate designation (set up on the Restrictions page). If the gift passes this test, then the matching gift program considers the matching ratios.

Currency Code

Note. The currency you select here applies to all amount fields on this page.

Note. The following fields are informational only and are not used in the automated matching gift process.

MG Designation Type
(matching gift designation type)

Indicate the designation to which matching gift funds must be applied when they are received. Values for this field include *Any Eligible*, *Donor's Designation*, and *Gen'l Operating Budget*. This field information only field enables you to determine to what designations a matching gift company's payment should be allocated.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Receipts

Select the appropriate option regarding receipts. *Periodically* means receipts may be combined and sent to the organization periodically. *Each Gift* means the organization requires a receipt from your institution for each company gift. This field is not included in automated acknowledgement process.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Distribution Schedule	<p>Determine the frequency with which organizations make matching gift payments to your institution. Values include: <i>Annually, Continuously, Monthly, Quarterly, Semiannually</i>.</p> <p>Values for this field are delivered with your system as translate values. You can modify these translate values.</p>
Distribution Date	Enter a value if the organization only matches gifts once a year on a specific date. Enter the date as mm/dd.
Deadline Date	Enter the date on which a completed matching gift form must be received by the organization in order for it to match the gift. Enter the date as mm/dd.
Overall Total	Enter the organization's total annual matching gift budget. This amount represents the total amount the organization will donate in matching gift payments to your institution as well as other institutions for the current year.
Donor/Institution Total	Enter the maximum monetary amount the organization will match toward one donor's gifts to your institution this year.
Institution Total	Enter the maximum monetary amount the organization will give to your institution in matching gift payments this year.
Donor Total	Enter the maximum amount the organization will pay in matching gifts for donations made by one donor to your institution as well as other institutions this year.
Payroll Eligibility	Select if the organization offers employees the option of having payroll deduction gifts matched through its matching gift program.
Duplicate Match	Select if the organization matches gifts that are matched by other organizations. For example, if a donor's gift is also matched by his or her spouse's employer, the donor's employer matches the gift as well.

Note. The following fields are used in the automated matching gift process.

Ratio	<p>Enter the formula by which an organization calculates the amount it matches for each regular donor gift to your institution. Ratio ranges can include fractions such as 1.25:1. This field is used in the automatic calculation of the expected matching gift amount.</p> <p>You can enter multiple match ratios as long as the amount ranges associated with each ratio do not overlap.</p>
Min Amt and Max Amt (minimum amount and maximum amount)	<p>For each ratio, enter a minimum amount and maximum amount. These fields are used in the automatic calculation of the expected matching gift amount.</p> <p>For example, if the matching gift organization matches 100 percent of gifts from USD 25-USD 25,000, the first minimum amount field on this page should be set to USD 25 and the first Ratio Minimum Amount field should be left blank or set to USD 0. The maximum amount field should include the cap for the match ratio, or USD 25,000. The system calculates that all qualified gifts are met at 100 percent up to USD 25,000.</p>

If the organization matches gifts larger than USD 25,000 at a different ratio (perhaps 0.5:1) then the minimum amount for the next ratio would be 25,000.01 with the appropriate cap entered in the maximum amount field.

Setting Up Matching Gift Restrictions

Access the Restrictions page.

RulesRestrictionsRqd Info/Contacts

Ford Motor CompanyID: AV1000

Ineligible Designation Types

View AllFirst1 of 1Last

Athletic Scholarships

+ -

Ineligible Gift Types

View AllFirst1 of 1Last

+ -

Eligible Alumni Status

View AllFirst1 of 1Last

+ -

Eligible Employee Status

View AllFirst1 of 1Last

+ -

Comment:

Restrictions page

- Ineligible Designation Types

Select the designation types that are not eligible for an organization’s matching gift program. This field is used in the automatic calculation of the expected matching gift amount.
- Ineligible Gift Types

Select the ineligible gift types that your organization does not match, such as dues or deferred gifts. This field is used in the automatic calculation of the expected matching gift amount.

Note. The following fields are informational only and are not used in the automated matching gift process.

- Eligible Alumni Status

Select the appropriate eligible alumni status. Alumni status refers to the status a donor must have as a formal student of your institution in order for the organization to match gifts made to your institution. Values for this field include *Alumnus*, *Attendance Requirement*, *Child or Spouse Attended*, and *Graduate*.

Values for this field are delivered with your system as translate values. You can modify these translate values.
- Eligible Employee Status

Select the appropriate eligible employee status. Employee status refers to the status a donor must have as an employee at the organization for it to

match gifts. Values for this field include *All Employees*, *All Full-Time Employees*, *Employees in US or Possessions*, *Full-Time Salaried Employees*, *Non-Employee Directors*, *Period of Service*, *Permanent Part-Time*, *Retired Employees*, *Spouses of Eligible Employees*, *Spouses of Eligible Retirees*, and *Widows/Widowers of Eligible Retirees*.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Comments

Enter any additional information about the organization's matching gift program. You can use this field to compile complex facts as appropriate for matching gift organizations so that you have access to specific decision-making information. This is a free-form text field.

Setting Up Required Information

Access the Rqd Info/Contacts page.

The screenshot displays the 'Rqd Info/Contacts' page for the 'Ford Motor Company' (ID: AV1000). The page is divided into several sections:

- Required Information:** A section with a dropdown menu and navigation buttons (View All, First, 1 of 1, Last, +, -).
- Matching Gift Contacts:** A section showing contact details for 'Talley, Judith', Director of Human Resources. It includes a 'Contacts' button and navigation buttons (View All, First, 1 of 1, Last).
- Contact Information:** A section showing the telephone number '555/444-9999' for the business.

Rqd Info/Contacts page

Required Information

Select the items an organization must receive prior to matching a gift. Examples are *Matching Gift Form*, *Original Check to Company*, *Donor Calls Company*, and *Receipt*.

Values for this field are delivered with your system as translate values. You can modify these translate values.

Matching Gift Contacts

This field displays the name of each organization contact at the organization with an ORG_CONTACT code of MG or matching gift coordinator, and his or her job title and telephone numbers. The ORG_CONTACT code is a delivered value and should not be deleted.

Contact

Click to access the page where contact information can be updated.

Contact Information

This area displays telephone numbers for matching gift contacts.

Defining Giving Club Information

This section discusses how to:

- Define giving clubs.
- Define giving club membership levels.

Pages Used to Set up Giving Club Information

Page Name	Object Name	Navigation	Usage
Giving Club Rules	AV_GCLUB_TBL	Manage Contributor Relations, Enter Commitments, Use, Giving Club Management, Giving Club Rules	Define the giving clubs at your institution.
Giving Club Levels	AV_GCLUB_LVL	Manage Contributor Relations, Enter Commitments, Use, Giving Club Management, Giving Club Levels	Define the various membership levels for a club based on a donor's giving.

Defining Giving Clubs

Access the Giving Club Rules page.

Giving Club Rules **Giving Club Levels**

Giving Club: ANNUAL **Institution:** PSUNV

Name: Annual Giving Club **Start Date:** 01/01/1900

Description: Annual Giving Club **End Date:**

Administrator: AV0027 Boudreaux, Lisele **Status:** Active

Campaign:

Club Rules

- ☒ Reset Membership at Fiscal Yr
- ☒ Notify Staff Assigned to Donor
- ☐ Special Acknowledgement

Include in Calculations

- ☒ Hard Credits ☐ Soft Credits
- ☒ Matching Gifts ☒ Spouse Giving

Eligible Designations

☐ All ☐ Type ☒ Specific

[View All](#) First 1-3 of 4 Last

*Business Unit	*Designation
LAWBU	LAWSCHOOL
LAWBU	LIBRARYEND
MEDBU	ANNUALFUND

Giving Club Rules page

- Name** Name the giving club (up to 30 characters).
- Administrator** Select a valid club administrators at your institution. Administrators are defined when you create Staff Assignments of Giving Club Administrator.
- Campaign** Select the campaign to associate with this giving club, if applicable. A campaign is an organized institutional effort targeted to a specific constituency that occurs over a specified period of time with specific purposes and goals. This prompt box contains a list of all the campaigns defined at your institution.

Club Rules

- Reset Membership at Fiscal Yr** (reset membership at fiscal year) Select to make the system recalculate and regenerate membership at the beginning of each new fiscal year.
- Notify Staff Assigned to Donor** Select to have the ability to set up workflow to send a notification to the assigned staff when a donor is added to the giving club. Your institution would set up the appropriate workflow to generate notifications.
- Special Acknowledgement** Select to have each new member of the giving club receive a special acknowledgement letter announcing his or her membership status.

Include in Calculations

- Hard Credit** Select to include hard credit when calculating a donor's eligibility for this giving club.

Soft Credit Select to include soft credit when calculating a donor's eligibility for this giving club.

Matching Gifts Select to include matching gifts when calculating a donor's eligibility for this giving club.

Spouse Giving Select to include spouse giving when calculating a donor's eligibility for this giving club.

Eligible Designations

All Select to include all designations in giving club calculations.

Type Select to include particular designations such as Law School, Scholarships, and so on. These values are defined on the Designation Type page.

Specific Select to include specific designations in giving club calculations.

Remaining Fields

Business Unit If you select *Type* or *Specific*, select the business unit associated with the designations to include in giving calculations. This field populates by default to the default business unit you selected when setting up user defaults.

Type Code If you select *Type*, select a designation type from the list of valid designation types at your institution. The designation types for the setID associated with the business unit you select display in the prompt box.

Designation If you select *Specific*, select each designation to which gifts count toward a donor's giving club membership eligibility. The designations associated for the setID with the business unit you select display in the prompt box.

Defining Giving Club Levels

Access the Giving Club Levels page.

Giving Club Rules **Giving Club Levels**

Giving Club: ANNUAL **Institution:** PSUNV

Name: Annual Giving Club

View All First 1 of 1 Last

Level: SILVER + -

Members: 0

Minimum: 1,000.00 USD **Maximum:** 0.00

View All First 1 of 1 Last

Benefit

Aerial campus photo + -

Giving Club Levels page

Level	Name the giving club (up to 10 characters). Level names are usually very specific for each institution, but an example might include a giving club with levels of <i>Bronze</i> , <i>Silver</i> , <i>Gold</i> , and <i>Platinum</i> .
Members	Displays the number of members in the club at this level.
Minimum and Maximum	Enter a giving amount range. This range determines the low and high end giving totals that make donors eligible for this giving club level. For multiple levels there can be no gaps in the ranges. If all gifts above a certain level qualify a donor for membership in the club at the highest level, the maximum amount for this level should be left blank.
Benefits	Enter descriptions of any giving level benefits associated with this giving club level. Benefits are privileges given to the members of the giving club at a particular level. Examples might be Library Privileges, Football Tickets, and other donor appreciation items. The information you enter in this field is for your reference only. No benefits processing occurs as a result of your entry.

Setting Up Credit Card Processing

Before you can enter gift or membership payments, or enable self-service online giving, you must set up your system for credit card processing.

This section discusses how to:

- Set up a connection with a third-party processor.
- Define payment methods.
- Define credit card types.

- Define connection parameters for a third-party processor.
- Associate the Merchant Table with a business unit.

Pages Used to Set Up Credit Card Processing

Page Name	Object Name	Navigation	Usage
Credit Card Type	AV_CR_CARD_TYPE	Design Student Administration, Define Contributor Relations, Setup, Credit Card Type	Define which credit cards are acceptable for credit card processing for each setID.
CR Merchants (Contributor Relations merchants)	AV_MERCHANT_TBL	Design Student Administration, Define Contributor Relations, Setup, Merchant Table	Specify site-specific service provider information for each institution in your organization. This information is sent to the defined service provider as part of every credit card transaction.
Business Unit CR (business unit Contributor Relations)	AV_BUS_UNIT_TBL	Design Student Administration, Define Contributor Relations, Setup, Business Unit CR	Associate a merchant table with a business unit.

Setting Up a Connection With a Third-Party Processor

To accept credit card payments over the internet, you must have an account with a merchant bank that offers internet credit card processing. In addition, you must establish a relationship with CyberSource and provide the identifying numbers for your bank account. Once you have established these two relationships, you must configure your system to connect with CyberSource.

CyberSource supports all major credit cards including: Visa, MasterCard, American Express, Discover/Novus, Diners Club, Carte Blanche, EuroCard, JCB, Visa delta, EDC/Maestro, Style, and various private label cards.

See Also

Customer Connection: Support: Documentation: Documentation Updates by Category: PeopleBook Enhancements: Financials: “PeopleSoft Credit Card Interlink Installation and Technical Notes”

Defining Payment Methods

To specify credit card payments, you must use the Tender Types page to define a credit card tender type. The Tender Types page enables you to set up the monetary forms in which your organization receives gifts.

See Also

Chapter 12, “Setting Up Commitment Management,” Defining Tender Types, page 116

Defining Credit Card Types

Access the Credit Card Type page.

Credit Card Type	
SetID: GLAKE	Credit Card Type: 02
Credit Card Name:	MASTERCARD
Credit Card Number Length:	16
Credit Card Status:	Active
Credit Card Valid Prefixes:	51,52,53,54,55
Use Check Digit Algorithm:	Y

Credit Card Type page

Credit Card Name	Enter the credit card name. This name becomes an available value on the Tender Type Detail page and the Make a Donation – Payment Information page and also is available in the Involvement self-service collaborative application.
Credit Card Number Length	<p>Enter the number of digits for this credit card number. Users must enter a credit card account number for this credit card that is equal to the value you specify. Separate valid card length values with a comma.</p> <p>Common number length values are as follows:</p> <ul style="list-style-type: none"> • Visa: 13 or 16 • MasterCard: 16 • American Express: 15 • Discover/Novus: 16
Credit Card Status	Select <i>Active</i> to make this credit card available for selection on credit card entry pages. Select <i>Inactive</i> to make this credit card unavailable for selection on credit card entry pages.
Credit Card Valid Prefixes	<p>Enter all valid prefix numbers for this credit card. Separate valid prefixes with a comma.</p> <p>Common prefix values are as follows:</p> <ul style="list-style-type: none"> • Visa: 4 • MasterCard: 51, 52, 53, 54, or 55 • American Express: 37 or 34 • Discover/Novus: 6011
Use Check Digit Algorithm	Select <i>Y</i> (yes) to have the system check the validity of the credit card numbers during the credit card entry process. Select <i>N</i> (no) to not have the system check credit card numbers for validity.

Defining Connection Parameters for Third-Party Processor

Access the CR Merchants page.

CR Merchants

Merchant ID: CR_MAIN
***Description:** Contributor Relations Main
***Credit Card Merchant ID:** YOURORG2
***Service Provide:** Cybersource
***Credit Card Processing Server:** ICS2TEST.IC3.COM:80
Credit Card IP Override: **Credit Card Tracing:** Connect with Trace

Perform Additional Services

***Address Verification Flag:** Address Verification On

Default Options

***Type of Name:** Primary ***Phone Type:** Home
***Address Type:** Home ***Email Type:** Home
***Email Address:** ps@ps.com

CR Merchants page

- | | |
|--------------------------------------|---|
| Credit Card Merchant ID | Enter the identifier assigned to your organization by your third-party credit card service provider. |
| Service Provide | Select your service provider. Your choices are <i>Cybersource</i> and <i>Unsupported</i> . Currently, PeopleSoft only supports CyberSource as a service provider. |
| Credit Card Processing Server | Identify the actual service provider server being accessed by the ics2api.dll file. This file comes from the third-party credit card processor when you establish an account with them. |
| Credit Card IP Override | Leave this field blank. The service provider uses this field as an IP address proxy. |
| Credit Card Tracing | <p>Select a control for the output files the system produces during each transaction. Your choices are:</p> <ul style="list-style-type: none"> • <i>Connect with Trace:</i> Connect with service provider and produce a trace file in C:\temp directory. • <i>No Connect with Trace:</i> Do not connect with service provider, but produce a trace file in C:\temp directory. • <i>Production:</i> No tracing of any kind. |

- *Vendor Trace*: Connect with service provider and turn on service provider tracing.

Address Verification Flag	Select to verify that the address passed in the transaction matches the address on the credit card account. Your choices are: <i>Address Verification On</i> , and <i>Address Verification Off</i> .
Type of Name	Select the type of name (<i>Primary</i> , <i>Preferred</i> , <i>Legal</i> , and so on) that will be used as the default when the name fields are initially populated on the Credit Card Entry page. Name type is specified on the Names page.
Phone Type	Select the type of phone (<i>Business</i> , <i>Home</i> , and so on) that will be used as the default when the name fields are initially populated on the Credit Card Entry page. Phone type is specified on the Phone Detail page.
Address Type	Select the type of address (<i>Primary</i> , <i>Preferred</i> , <i>Business</i> , and so on) that will be used as the default when the name fields are initially populated on the Credit Card Entry page. Address type is specified on the Addresses page.
Email Type	Select the type of email address (<i>Home</i> , <i>Business</i> , and so on) that will be used as the default when the name fields are initially populated on the Credit Card Entry page. Email type is specified on the Electronic Addresses page.
Email Address	CyberSource requires an email address to be sent with each transaction. If an ID does not have an email address, the email address entered in this field is sent with the transmission.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Maintaining Bio/Demographic Data,” Entering and Updating Basic Bio/Demo Data

Associating Merchant Table With Business Unit

Access the Business Unit CR page.

Business Unit CR	
Business Unit:	MEDBU
*Description:	Medical Business Unit
Short Description:	Med-bu
*Institution:	PSUNV PeopleSoft University
*Base Currency:	USD US Dollar
*Rate Type:	OFFIC OFFICIAL
Tender Type:	CHK
General Ledger Unit:	PSUNV
Merchant ID:	CR_MAIN Contributor Relations Main

Business Unit CR page

This page populates with the default values for the business unit. To define the credit card merchant information and credit card default options for each business unit, enter the Merchant ID from the CR Merchant table. You must associate each business unit with a merchant table ID.

Setting Up Self-Service Online Giving and Pledges

In addition to credit card interface setup requirements, there are eight pages that you must use to set up your system for online giving. These same pages enable you to set up self-service online pledge capability.

Note. This section contains new functionality related to Update ID #112126 that was posted to Customer Connection in November 2002.

This section discusses how to:

- Define Involvement settings.
- (Optional) Define web designations.
- (Optional) Define web appeals.
- (Optional) Define web campaigns.
- (Optional) Define designations linked to a campaign.
- (Optional) Define appeals linked to a campaign.
- (Optional) Define giving vehicles.

Although the pages above are not required by record definition or by code, self-service donors cannot make a gift or pledge unless information has been set up on those pages.

Pages Used to Set Up Self-Service Online Giving

Page Name	Object Name	Navigation	Usage
Involvement Setup	AV_INST_WEB_INV	Design Student Administration, Define Contributor Relations, Setup, Involvement, Involvement Setup	Set institution-specific settings for online gift and pledge sessions.
Web Designations	AV_INST_WEB_DES	Design Student Administration, Define Contributor Relations, Setup, Involvement, Web Designations	Set up the web designations available to self-service donors during online gift and pledge sessions.
Web Appeals	AV_INST_WEB_MTVTN	Design Student Administration, Define Contributor Relations, Setup, Involvement, Web Appeals	Set up the web appeals available to self-service donors during online gift and pledge sessions.
Web Campaigns	AV_INST_WEB_CMP	Design Student Administration, Define Contributor Relations, Setup, Involvement, Web Campaigns	Set up web campaigns available to self-service donors during online gift and pledge sessions. To facilitate campaign-specific giving, link available designations and appeals to each campaign.
Web Campaign Narrative	AV_WEB_CMP_NARR_SP	Click the Narrative link on the Web Campaigns page.	Provide donors with more descriptive information about your available web campaigns.
Involvement Setup – Campaign Linked Designations	AV_WEB_CMP_DES	Click the Link Design link on the Web Campaigns page.	Link specific designations to a selected web campaign and choose a specific campaign designation default.
Campaign Linked Appeals	AV_WEB_CMP_MTVTN	Click the Link Appeal link on the Web Campaigns page.	Link specific appeals to a selected web campaign and choose a specific campaign appeal default.
Giving Vehicles	AV_GIVING_VEHICLE	Design Student Administration, Define Contributor Relations, Setup, Giving Vehicles	Define and describe alternative methods of giving.

Defining Involvement Settings

Access the Involvement Setup page.

Involvement Setup	Web Designations	Web Appeals	Web Campaigns
Institution: PSUNV PeopleSoft University			
View All First 1 of 1 Last			
*Effective Date: 10/31/2002		*Status: Active	
*Constituent Type: Friend			
*Payable to name: PSUNV Foundation c/o John Jacob			
<input checked="" type="checkbox"/> Online Gifts <input checked="" type="checkbox"/> Linked Gifts <input checked="" type="checkbox"/> Online Pledges			
*Default Payment Schedule:		Semi-Annual	
Mail in address information			
Country:	United States Change Country		
Address 1:	1600 New York Avenue		
Address 2:			
Address 3:			
City:	Harrisburg		
County:		Postal:	20015
State:	PA Pennsylvania		

Involvement Setup page (1 of 2)

Additional information contact			
User ID:	ITL		
Email ID:	Julie McDonough		
*Telephone:	602/282-3035		
Session Defaults			
*User ID:	PS		
*Business Unit:	MEDBU	Medical Business Unit	
*Session Count:	5		
*Tender Type:	Credit Card		

Involvement Setup page (2 of 2)

Constituent Type

Select the constituent type assigned to the visitor when the system is processing a self-service gift or pledge and the donor does not have an existing constituent type. Examples include *Friend*, *Alumni*, *Faculty*, *Parent*, *Staff*, and so on. These values are defined by the organization on the Constituent Type page.

See [Chapter 13, “Managing Constituent Data,” Maintaining Constituent Types, page 168.](#)

Payable to name	Enter the institution or department name to which the donation or pledge will be sent.
Online Gifts, Linked Gifts, Online Pledges	<p>These three check boxes control the links that appear on the Donations – Ways to Give page:</p> <p><i>Online Gifts:</i> If selected, the system displays the <i>Make your gift securely online</i> link. This link takes donors directly to the Make a Donation – Welcome page to start the online giving process.</p> <p><i>Linked Gifts:</i> If selected, the system displays the <i>Invest in existing campaigns</i> link. This link takes donors to the Donations – Campaigns page, where they receive web-specific campaign information and can choose whether to make a gift or a pledge to the campaign.</p> <p><i>Online Pledges:</i> If selected, the system displays the <i>Make a pledge online</i> link. This link takes donors to the Make a Donation – Welcome page to start the online pledge process.</p>
Default Payment Schedule	Select the default payment schedule value to appear on the Make a Donation – Payment Information page for pledges. Delivered values are <i>Semi-Annual</i> , <i>Annual</i> , <i>Bi-Monthly</i> , <i>Monthly</i> , <i>Quarterly</i> , and <i>Weekly</i> .

Mail in address information

The address information you define here appears on the Donations – Ways to Give page and on the Mail In Donation Form. Mail in address information is used by online visitors who prefer to make a gift or pledge through the mail.

Additional information contact

You must enter either a staff ID or an email ID in this section.

Staff ID	Select the ID of a staff member that corresponds to the email address that you want to appear as a hyperlink on the Donations – Ways to Give page to be used for inquiries. Only staff members set up as PeopleSoft users with email addresses appear in the list.
Email ID	Enter an email address to be used for inquiries. If the staff ID entered above has a defined email address, the system populates it by default.

Session defaults

User ID	Enter the user ID assigned to the online gift or pledge sessions. When a gift entry user creates a session, their ID is associated with that session. They can only view or change sessions that they have entered, unless given more access through their defined role. Only users with the role of gift entry operator or gift and pledge supervisor appear in the list.
Business Unit	Select the default business unit that the system assigns to the online gift or pledge session.

For online giving, this business unit must have an assigned merchant ID to correctly authorize online donations. Use the Business Unit CR page to associate a merchant table with a business unit.

See [Chapter 12, “Setting Up Commitment Management,” Associating Merchant Table With Business Unit, page 145.](#)

Session Count

Enter a maximum number of gifts or pledges to be included in a single self-service session. The minimum number of gifts in a session is 1.

Tender Type

Select the tender type assigned to the self-service gift for online giving. Only tender types with a Special Fields value of *Credit Card* appear in the list.

Note. This field does not apply to pledges.

See [Chapter 12, “Setting Up Commitment Management,” Defining Tender Types, page 116.](#)

Defining Web Designations

Access the Web Designations page.

Institution: PSUNV PeopleSoft University

View All First 1 of 1 Last

Effective Date: 10/31/2002

Available Designations View All First 1 of 8 Last

*Sequence: 10 *Designation Business Unit: MEDBU *Designation: ANNUALFUND + -

*Description: Annual Fund Web a

☒ Gifts ☒ Pledges

Default Gift Designation

Sequence	Des BU	Designation	Description
20	MEDBU	LAW SCHOOL	Law School Dean's Fund

Default Pledge Designation

Sequence	Des BU	Designation	Description
80	PSUNV	ALUMNISUST	WEB Alumni Assn Sustaining Mbrshps

Web Designations page

Available Designations

Sequence

Enter a numeric identifier for all unique combinations of designation business unit and designation.

Designation Business Unit

Enter the operational unit to which the gift or pledge is designated.

Designation	Enter the designation or fund for distribution.
Description	Describe the designation (up to 80 characters). The system populates the long description as defined for the designation, but you can edit the text. The descriptions appear as available values on the Make a Donation – Gift Information and Make a Donation – Pledge Information pages.
Gifts	Select to make the designation available for self-service gifts. If this check box is selected for a designation, it appears when donors choose to apply their gift to specific funds, rather than to the institution's greatest need.
Pledges	Select to make the designation available for self-service pledges. If this check box is selected for a designation, it appears when donors choose to apply their pledge to specific funds, rather than to the institution's greatest need.

Important! You must save the designations entered above, for the system to populate the list of available default gift and pledge designations below.

Default Gift Designation

The sequence number of the designation you select here becomes the default designation business unit and designation for a gift. The default designation also appears on the Make a Donation – Gift Information page. If a donor does not select a specific designation fund, and chooses the option to *Apply my gift to the greatest need*, the donation goes to this assigned default designation.

Default Pledge Designation

The sequence number of the designation you select here becomes the default designation business unit and designation for a pledge. The default designation also appears on the Make a Donation – Pledge Information page. If a donor does not select a specific designation fund, and chooses the option to *Apply my pledge to the greatest need*, the donation goes to this assigned default designation.

If you do not select a default pledge designation here, donors will be required to choose pledge distribution information on the Make a Donation – Pledge Information page.

Defining Web Appeals

Access the Web Appeals page.

Institution: PSUNV PeopleSoft University

View All First 1 of 1 Last

Effective Date: 10/31/2002

Available Appeals View All First 1 of 3 Last

*Appeal Code: ACASCH ☐ Gifts ☒ Pledges

*Description: Academic Scholarship Mailing

Default Gift Appeal

Appeal Code	Description
ALUMAN	Alumni Annual Membership Appeal on the web

Default Pledge Appeal

Appeal Code	Description
ANNUAL	Annual Fund

Web Appeals page

Available Appeals

Appeal Code

Enter the code for an appeal that motivates a donor to respond and donate. The appeals you set up here appear as values on the Make a Donation – Gift Information and Make a Donation – Pledge Information pages.

Description

Describe the appeal (up to 80 characters). The system populates this field with the default value assigned to the Appeal Code, but you can edit the text. This description appears on the Make a Donation – Gift Information and Make a Donation – Pledge Information pages.

Gifts

Select to make the appeal available for self-service gifts. These selections become available when donors choose which appeal they are responding to.

Pledges

Select to make the appeal available for self-service pledges. These selections become available when donors choose which appeal they are responding to.

Important! You must save the appeals entered above, for the system to populate the list of available default gift and pledge appeals below.

Default Gift Appeal

The appeal code you select here becomes the default appeal description assigned to an online gift on the Make a Donation – Gift Information page. The self-service donor can change this from the default to another available value.

If you do not select a default gift appeal here, donors will be required to select how they heard about your organization on the Make a Donation – Gift Information page.

Default Pledge Appeal

The appeal code you select here becomes the default appeal description assigned to an online pledge on the Make a Donation – Pledge Information page. The self-service donor can change this from the default to another available value.

If you do not select a default pledge appeal here, donors will be required to select how they heard about your organization on the Make a Donation – Pledge Information page.

Defining Web Campaigns

Access the Web Campaigns page.

Institution: PSUNV PeopleSoft University

Effective Date: 11/01/2002

Available Campaigns Find | View All First 1 of 3 Last

*Initiative Code: ANNFUND ☐ Gifts ☒ Pledges [Link Desig](#) [Link Appeal](#) [+](#) [-](#)

*Description: Annual Fund Campaign [Narrative](#)

Default Gift Campaign

Campaign	Description
EDUCATION	College of Education Campaign

Default Pledge Campaign

Campaign	Description
EDUCATION	College of Education Campaign

[Save](#) [Return to Search](#) [Update/Display](#) [Include History](#) [Correct History](#)

[Involvement Setup](#) | [Web Designations](#) | [Web Appeals](#) | [Web Campaigns](#)

Web Campaigns page

Available Campaigns

Initiative Code

Enter the code for a campaign that motivates a donor to respond and donate. The campaign you set up here appears on the Make a Donation – Gift Information and Make a Donation – Pledge Information pages.

Description

Describe the campaign (up to 80 characters). The system populates this field with the default value assigned to the Initiative Code, but you can edit the text. This description appears on the Make a Donation – Gift Information and Make a Donation – Pledge Information pages.

Narrative	Click to access the Web Campaign Narrative page, where you can enter a longer description of the campaign that self-service donors will see on the Donations – Campaigns page.
Gifts	Select to make the campaign available for self-service gifts. Additionally, the campaign will appear on the Donations – Campaigns page with a <i>Give to this campaign</i> link next to it.
Pledges	Select to make the campaign available for self-service pledges. Additionally, the campaign will appear on the Donations – Campaigns page with a <i>Pledge to this campaign</i> link next to it.
Link Design (link designation)	Click to open the Involvement Setup – Campaign Linked Designations page, where you can associate specific designations with the campaign. You must link at least one designation to each selected campaign.
Link Appeal	Click to open the Involvement Setup – Campaign Linked Appeals page, where you can associate specific appeals with the campaign. You must link at least one appeal to each selected campaign.

Important! You must save the campaigns entered above, for the system to populate the list of available default gift and pledge campaigns below.

Default Gift Campaign

The campaign you enter here becomes the default campaign description assigned to an online gift on the Make a Donation – Gift Information page. The self-service donor can change this from the default to another available value.

If you do not select a default gift campaign here, donors will be required to select a campaign code on the Make a Donation – Gift Information page.

Default Pledge Campaign

The campaign you enter here becomes the default campaign description assigned to an online pledge on the Make a Donation – Pledge Information page. The self-service donor can change this from the default to another available value.

If you do not select a default pledge campaign here, donors will be required to select a campaign code on the Make a Donation – Pledge Information page.

Entering a Web Campaign Narrative

Access the Web Campaign Narrative page.

Web Campaign Narrative

Initiative Code: SCHOLARSHP

Description: Scholarship Campaign

HTML Narrative:

A gift to the Scholarship Campaign ...
 ... allows us to recruit top students. With rising educational costs, the competition for today's top student scholars is keen, and scholarship opportunities are a major factor in attracting the best students.
 ... retains high-quality students. Scholarships for those who continue to exhibit excellence in their studies encourage students to pursue their education with continuity at a single institution.
 ... assists students in need. While the University is among the top states in students who graduate from high school, it ranks 18th in those who complete college. Cost is the primary reason given for failure to pursue higher education.
 ... enriches diversity. While 10% of Utah's high school students are minorities, only six percent of those students take college admission tests. Many are economically disadvantaged and are unable to achieve a higher education.

OK
Cancel

Web Campaign Narrative page

HTML Narrative

Enter a description of any length, to provide donors with more detailed information about your available web campaigns. You can enter basic HTML markup tags to format the text that appears on the Donations – Campaigns page.

Defining Campaign Linked Designations

Access the Involvement Setup – Campaign Linked Designations page.

Involvement Setup

Campaign Linked Designations

Institution: PSUNV PeopleSoft University **Effective Date:** 10/31/2002

Campaign: ANNFUND Annual Fund Campaign

Available Designations for this Campaign						First ◀ 1-3 of 3 ▶ Last	
*Sequence	Designation Business Unit	Designation	Description	Gifts	Pledges	Gift Default	Pledge Default
10	MEDBU	ANNUALFUND	Annual Fund Web a	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
20	MEDBU	LAW SCHOOL	Law School Dean's Fund	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
30	MEDBU	WOMENBASKET	Women's Basketball Program	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Copy All Web Designations

Involvement Setup - Campaign Linked Designations page

The selections you make on this page control the designation options that appear on the Make a Donation – Gift Information and Make a Donation – Pledge Information pages.

Sequence	Select a designation sequence number; this designation is linked to the selected campaign. The Designation Business Unit, Designation, and Description appear to the right.
Gifts	Select to link a designation to the campaign for self-service gifts. The Gifts column appears here only if the Gifts check box is selected on the Web Campaigns page. Also, if the Gifts check box is cleared on the Web Designations page for a particular designation, the check box appears here but is unavailable for input.
Pledges	Select to link a designation to the campaign for self-service pledges. The Pledges column appears here only if the Pledges check box is selected on the Web Campaigns page. Also, if the Pledges check box is cleared on the Web Designations page for a particular designation, the check box appears here but is unavailable for input.
Gift Default, Pledge Default	You must define one default gift designation and one default pledge designation for the campaign from the list of available designations for this campaign. This default value appears when donors choose to apply their gift or pledge to specific funds, rather than the greatest need.
Copy All Web Designations	Click to populate this page with all designation values defined on the Web Designations page.

Defining Campaign Linked Appeals

Access the Involvement Setup – Campaign Linked Appeals page.

Involvement Setup

Campaign Linked Appeals

Institution: PSUNV PeopleSoft University **Effective Date:** 10/31/2002
Campaign: ANNFUND Annual Fund Campaign

Available Appeals for this Campaign
First ◀ 1-3 of 3 ▶ Last

*Appeal Code	Description	Gifts	Pledges	Gift Default	Pledge Default		
ACASCH	Academic Scholarship Mailing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
ALUMAN	Alumni Annual Membership Appeal on the web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	+	-
ANNUAL	Annual Fund	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-

Copy All Web Appeals

Involvement Setup - Campaign Linked Appeals page

The selections you make on this page control the appeal options that appear on the Make a Donation – Gift Information and Make a Donation – Pledge Information pages.

Appeal Code	Select an appeal code; this appeal code is linked to the selected campaign. Its Description appears to the right.
--------------------	---

- Gifts** Select to link an appeal to the campaign for self-service gifts. The Gifts column appears here only if the Gifts check box is selected on the Web Campaigns page. Also, if the Gifts check box is cleared on the Web Appeals page for a particular appeal, the check box appears here but is unavailable for input.
- Pledges** Select to link an appeal to the campaign for self-service pledges. The Pledges column appears here only if the Pledges check box is selected on the Web Campaigns page. Also, if the Pledges check box is cleared on the Web Appeals page for a particular appeal, the check box appears here but is unavailable for input.
- Gift Default, Pledge Default** You must define one default gift appeal and one default pledge appeal for the campaign from the list of available appeals for this campaign. This default value appears when donors choose which appeal they are responding to.
- Copy All Web Appeals** Click to populate this page with all appeal values defined on the Web Appeals page.

Defining Giving Vehicles

Access the Giving Vehicles page.

Giving Vehicles

Institution: PSUNV Giving Code: 0006

Giving Vehicle Detail View All First 1 of 1 Last

*Effective Date:	11/01/2001	*Status:	Active	+ -
*Short Title:	Gift of Securities			
*Description:	Gifts of appreciated securities may be deducted at full-market value on the date of transfer to the College. (Securities which you have held for one year or more are deductible up to 30% of your adjusted taxable income; the balance must be carried forward within the same year.)			

Additional information contact

User ID: PS

Email ID: ps@ps.edu

Telephone:

Giving Vehicles page

These methods appear under the Other Ways to Give heading on the Ways to Give page.

- Giving Code** Displays the unique identifying code entered when the vehicle was created on the Add a New Value page.

Note. Once you create a giving vehicle, for historical data reasons you cannot delete or change the giving code.

Short Title	Describe the giving vehicle (up to 30 characters), which appears as a subtitle on the Ways to Give page.
Description	Enter a longer description of the alternative giving method. This text follows the short title displayed on the Ways to Give page.

Additional information contact

User ID	Select the ID of the defined staff member listed as a contact name for inquiries about this giving vehicle.
Email ID	Enter the email address to be used for inquiries about this giving vehicle. The system populates this field.

CHAPTER 13

Managing Constituent Data

This chapter lists common elements, provides an overview of constituent data maintenance, and discusses how to:

- Search for records.
- Add people to your system.
- Manage addresses and phone numbers.
- Track external system IDs.
- Manage names.
- Maintain constituent types.
- Track religious preferences.
- Maintain photos.
- Add constituent types to graduates.
- Maintain degree information.
- Maintain work experience information.
- Add organizations.
- Enter location data for organizations.
- Enter department data for organizations.
- Enter contact data for organizations.
- Maintain organization financial information.
- Define an organization's matching gift rules.
- View an organization's matching gift rules.
- Review organization data.
- View an organization's employee list.
- View profiles.
- Update a donor's record/add a donor.
- View a constituent's audience history.
- Maintain involvement information.
- Establish relationships.

See Also

[Chapter 4, “Setting Up Constituent Data,” page 41](#)

Searching for Records

This section provides an overview and discusses how to search for constituent records.

Understanding Records

PeopleSoft Contributor Relations provides three different mechanisms to search for constituent’s records.

- The Search/Match page is identical to the one found PeopleSoft Campus Community, and enables you to search for specific people based on basic information such as name and address. This page should be used to make sure a person does not already have an existing record before you add them to the system.
- The CR Search page enables you to search for people based on more specific criteria such as class year, constituent type, or ethnicity. You can search based on any variety of criteria on this page. For example, you could search for all the constituents with a class year of 1990 that reside in Texas.
- The Organization Search page enables you to search specifically for those constituents that are organizations. You can specify search criteria such as FICE Code, ATP Code, or organization type.

Pages Used to Search for Records

Page Name	Object Name	Navigation	Usage
Search/Match	SEARCH_TABLE	Design Student Administration, Establish People Processing, Setup, Search/Match Criteria, Search/Match Criteria	Use the Search/Match Criteria page to specify sets of criteria and arrange them in order for searching for duplicate or multiple records.
CR Search (Contributor Relations search)	AV_SEARCH_MATCH	<ul style="list-style-type: none"> • You can access the CR Search page through multiple navigation paths. The list below contains the most frequently used paths. • Manage Contributor Relations, Analyze Giving History, Inquire, CR Search, CR Search • Manage Contributor Relations, Enter Commitments, Inquire, CR Search, CR Search • Manage Contributor Relations, Manage People, Inquire, CR Search, CR Search 	Search for constituents that meet specific selection criteria. For example, you could search for all the constituents who have a Class Year of 1990 and reside in the State of Texas.

Page Name	Object Name	Navigation	Usage
CR Search Result (Contributor Relations search result)	AV_SEARCH_MATCH_R	<ul style="list-style-type: none"> You can access the CR Search Result page through multiple navigation paths. The list below contains the most frequently used paths. Manage Contributor Relations, Analyze Giving History, Inquire, CR Search, CR Search Result Manage Contributor Relations, Enter Commitments, Inquire, CR Search, CR Search Result Manage Contributor Relations, Manage People, Inquire, CR Search, CR Search Result 	View a list of constituents that match the search criteria you selected on the CR Search page.
Organization Search	ORG_SEARCH	<ul style="list-style-type: none"> Build Community, Organization Data, Inquire, Org Search, Org Search Manage Contributor Relations, Manage Organizations, Inquire, Org Search, Org Search 	Specify criteria for searching for organizations.

Using Search/Match

To best avoid entering duplicate personal records, use the Search/Match functionality any time you are entering a new person in your database. Search/Match criteria is utilized when you save a *new* person, but if a potential duplicate is detected, use Search/Match anyway to investigate the existing person record(s). Start with Search/Match to look for the person before adding them to your database.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Setting Up Search/Match Criteria”

Using CR Search

Access the CR Search page.

CR Search

CR Search Result

Institution:

PSUNV

PeopleSoft University

National ID:

First Name:

Last Name:

City:

State:

Country:

Constituent Type:

Ethnic Group:

Sex:

Death Date:

Birthdate:

Clear Data

Search

Class Year:

CR Search page

Enter information in any field on this page, to search for a constituent based on that value or combination of values.

- National ID

Enter the national ID of the constituent.
- Ethnic Group

Select the ethnic group of the constituent.
- Class Year

Select the class year of the constituent.
- Clear Data

Click to clear the selections on the page.
- Search

Click to retrieve a list of constituents matching your selection criteria on the CR Search Results page.

Note. The Maximum Retrieval value, set on the Institution Installation page, determines the maximum number of results returned per search.

Viewing CR Search Results

After entering selection criteria on the CR Search page, access the CR Search Result page.

CR Search

CR Search Result

Search/Match Level Executed:

Carry ID Reset

View All

First

1-10 of 2954

Last

Carry ID Set	ID	Name Type	Eff Date	First Name	Last Name	National ID	Birthdate	Sex	L A E F P S I	Campus ID	Details
1 Carry ID Set	AA0031	Primary	01/01/2000	Paul	Briggs			Male	- - - - -		Details
2 Carry ID Set	AA0031	Preferred	01/01/2000	Paul	Briggs			Male	- - - - -		Details
3 Carry ID Set	AD1000	Primary	08/10/1998	John	Roberts	412554485	01/14/1979	Male	- A - - - -	MAIN	Details
4 Carry ID Set	AD1000	Preferred	08/10/1998	John	Roberts	412554485	01/14/1979	Male	- A - - - -	MAIN	Details
5 Carry ID Set	AD1005	Primary	08/10/1998	Tyler	Perkins	985887458	02/20/1970	Male	- - - - P -		Details
6 Carry ID Set	AD1005	Preferred	08/10/1998	Tyler	Perkins	985887458	02/20/1970	Male	- - - - P -		Details
7 Carry ID Set	AD1007	Primary	08/10/1998	Trevor	Ramos	785963598		Male	- - - - P -		Details
8 Carry ID Set	AD1007	Preferred	08/10/1998	Trevor	Ramos	785963598		Male	- - - - P -		Details
9 Carry ID Set	AD1011	Primary	08/10/1998	Allen	Boyd	214445789		Male	- - - - P -		Details
10 Carry ID Set	AD1011	Preferred	08/10/1998	Allen	Boyd	214445789		Male	- - - - P -		Details

CR Search Result page

Carry ID Reset

Click to cancel any selections you have made via the Carry ID Set button.

Carry ID Set

Click to set this record as default upon opening pages in PeopleSoft Contributor Relations.

L A E F P S I

Indicate the person's relationship to your institution. The following table lists the possible values and their descriptions:

Code	Description
L	Alumni
A	Student Applicant
E	Employee
F	Financial Aid
P	Prospect
S	Student
I	Student Financials

Details

Click to open the Demographic Data component.

See AlsoChapter 13, "Managing Constituent Data," Using CR Search, page 161

Using Organization Search

You can search for organizations using the global search pages in the PeopleSoft Campus Community portion of your system that are set up specifically for this type of search. You can also tell the system how to sort the results of your search.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Organization Data,” Understanding Organization Search

Adding People to Your System

This section discusses how to add people to your system. These pages maintain information about the constituent such as names, addresses, gender, birth, death, citizenship, military status, ethnicity, and disabilities.

Pages Used to Add People to Your System

Page Name	Object Name	Navigation	Usage
Names	NAMES	<ul style="list-style-type: none"> You can access the Names page through multiple navigation paths. Below is the most frequently used path. Manage Contributor Relations, Manage People, Use, Names, Names 	Enter or update name types for an individual.
Bio/Demo Data	SA_BIO_DEMO_DATA3	<ul style="list-style-type: none"> You can access the Bio/Demo Data page through multiple navigation paths. Below is the most frequently used path. Manage Contributor Relations, Manage People, Use, Bio Demo Data, Bio/Demo Data 	Enter or update basic biographic and demographic data for individuals.
Addresses	ADDRESSES	<ul style="list-style-type: none"> You can access the Addresses page through multiple navigation paths. The list below contains the most frequently used paths. Manage Contributor Relations, Manage People, Use, Addresses, Addresses Manage Contributor Relations, Manage People, Workset, Address Inquiry, Addresses 	Enter or update address types for an individual.

Entering Names

Access the Names page to enter information about a person's name.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Maintaining Bio/Demographic Data," Entering Name Types

Entering Bio/Demo Data

Access the Bio/Demo Data page to enter biographic and demographic information about a person.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Maintaining Bio/Demographic Data," Entering Basic Bio/Demo Data

Entering Addresses and Phone Data

Access the Addresses page to enter information about all the addresses associated with a person.

See Also

PeopleSoft 8 SPI Campus Community Fundamentals PeopleBook, “Maintaining Bio/Demographic Data,” Managing Addresses

Managing Addresses and Phone Numbers

This section discusses how to manage addresses and phone numbers.

Note. PeopleSoft Contributor Relations utilizes PeopleSoft Campus Community pages to maintain addresses and phone numbers. You can use these pages to update linked addresses, track electronic addresses, and view address data.

Pages Used to Manage Addresses and Phone Numbers

Page Name	Object Name	Navigation	Usage
Update Linked Addresses	RUNCTL_ADDRLINK	<ul style="list-style-type: none"> Build Community, Bio/Demographic Data, Process, Update Linked Addresses, Update Linked Addresses Manage Contributor Relations, Manage People, Process, Update Linked Addresses, Update Linked Addresses 	Run the update linked addresses process.
Electronic Addresses	E_ADDR_PERS	<ul style="list-style-type: none"> Build Community, Bio/Demographic Data, Use, Electronic Addresses, E Addr Pers Manage Contributor Relations, Manage People, Use, Electronic Addresses, E Addr Pers 	Enter or review email and URL addresses for an individual.
Address Inquiry	ADDRESSES_DISP	<ul style="list-style-type: none"> Build Community, Bio/Demographic Data, Inquire, Address Inquiry, Addresses Disp Manage Contributor Relations, Manage People, Inquire, Address Inquiry, Addresses Disp 	View a list of all addresses in your system for an individual.

Updating Linked Addresses

When you update the address for a relation linked to an individual, the address for the linked entity is not changed in your database on the Addresses page for the individual until you run the Update Linked Addresses process. When you run the process, the system finds the individual with whom that relation is linked and updates the changed address data associated there as well.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Maintaining Bio/Demographic Data,” Updating Linked Addresses

Entering Electronic Addresses

Access the Electronic Addresses page to maintain information about constituents email and URL addresses. You can specify a type for each address, such as work and home.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Maintaining Bio/Demographic Data,” Entering Email Address Detail Data

Viewing Address Data

Access the Addresses page to view information about a constituent who is a person.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Maintaining Bio/Demographic Data,” Viewing Addresses and Address Change History

Tracking External System IDs

Use the External System IDs page to track constituent IDs by a number other than the PeopleSoft Contributor Relations ID.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing IDs,” Changing IDs

Managing Names

Use the Names page to specify a name type and name part for each full name and name part that an individual may use.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Maintaining Bio/Demographic Data,” Entering Name Types

Maintaining Constituent Types

This section provides an overview and discusses how to maintain constituent types.

Understanding Constituent Types

Constituent types are the relationships that exist between a constituent and your institution. Constituent types are used extensively in reporting and in completing many business processes.

Pages Used to Maintain Constituent Types

Page Name	Object Name	Navigation	Usage
Constituent Type	AV_CNST_TYPE_TBL, AV_CNST_TYPE_TBL_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage People, Use, Constituent Types, Constituent Type • Manage Contributor Relations, Manage People, Workset, Constituent Type 	Assign constituent types to a constituent.
Constituent Type Summary	AV_CNST_TYPE_INQ, AV_CNST_TYPE_INQ_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage People, Inquire, Constituent Type Summary • Manage Contributor Relations, Manage People, Workset, Constituent Type Summary 	View a list of all the constituent types assigned to a constituent.

Assigning Constituent Types

Access the Constituent Type page.

Constituent Type

Gallegher, Shawn
Constituent Type: Alumni
ID: AV0001
Yr: 2001
Institution: PSUNV

Constituent Types			View All	First	1-5 of 5	Last
*Constituent Type	Start Date	Past				
1 Alumni	07/20/1998	<input type="checkbox"/>				
3 Student	07/20/1998	<input checked="" type="checkbox"/>				
4 Parent	07/20/1998	<input type="checkbox"/>				
6 Faculty	07/20/1998	<input type="checkbox"/>				
7 Staff	07/20/1998	<input checked="" type="checkbox"/>				

Constituent Type page

Your selections on this page indicate the relationships that exist between a constituent who is a person and your institution. An organization can be assigned one constituent type. You can assign an organization's constituent type on the Organization Financial Information page.

Past

Select if the constituent no longer has the relationship with your institution. For example, if a constituent is a *Parent*, and his/her child graduates, the constituent type of *Parent* should be past.

Note. Once constituent types are assigned to a constituent, you cannot delete the last remaining constituent type assignment. For example, if a constituent is assigned as both an *Alumni* and a *Parent*, you can delete one of these constituent types, but one must remain in the system.

Tracking Religious Preferences

Use the Religious Preference page to indicate a constituent's religion, if any. You can view a constituent's religious preference on the Person Profile page.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Maintaining Bio/Demographic Data," Entering Religious Preferences Data

Maintaining Photos

You can store photographs of your constituents. Photographs are stored the same way they are stored in any Windows application.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Identification Data,” Entering Photos

Adding Constituent Types to Graduates

This section discusses how to add constituent types to graduates.

PeopleSoft Contributor Relations provides a job process that searches for a group of graduates and adds to their records a constituent type of Alumni, based on each graduate’s program completion date. Running the process also generates a report that lists the search results and notes any record changes.

Page Used to Add Constituent Types to Graduates

Page Name	Object Name	Navigation	Usage
Graduates To Alumni	AV_RUNCTL_CONFR	Manage Contributor Relations, Manage People, Process, Graduates to Alumni	Run the AV_CONFER process that adds a constituent type of Alumni to a graduate. The criteria entered on this page determines which graduates are selected for the process.

Running the Graduates to Alumni Process

Access the Graduates To Alumni page.

Graduates To Alumni

Run Control ID: ALUMNI [Report Manager](#) [Process Monitor](#) Run

☒ Report Only

*Academic Institution: PeopleSoft University

*Academic Career:

*Completion Term: 2001 Spring

Constituent Type: Alumni

Graduates to Alumni page

Report Only

Select to generate the Graduates To Alumni report (AV702) without making any changes to the Constituent Type table. Clear to both generate the report and add the graduates to the Constituent Type table with a constituent type of *Alumni*, if they do not have that assigned constituent type already.

Academic Institution	Enter the associated academic institution for the graduates.
Academic Career	Select the associated academic career for the graduates. These values are defined by the institution.
Completion Term	Enter the term in which the graduates were or will be granted their degrees. These values are defined by the institution.
Constituent Type	<hr/> Note. Displays <i>Alumni</i> , the only constituent type inserted through this process. <hr/>

When users run this process, the system does the following:

1. Gathers all records that meet the institution, academic career, and completion term criteria entered on the Graduate to Alumni page, where the Degree Confer Date is not 'Null' and the Degree Status is 'Active'.
2. Determines whether these records already have a constituent type set to Alumni.
3. If the Report Only check box was cleared, the system makes inserts to the Constituent Type table (PS_AV_CNST_TYP_TBL) where required.
If the person is not already assigned a constituent type of Alumni (type = 1), then a record is inserted for the current date with a constituent type of 1.
4. Regardless of whether the Report Only check box was selected, the system generates report AV702.

See Also

[Chapter 4, "Setting Up Constituent Data," Defining Constituent Types, page 42](#)

[Chapter 13, "Managing Constituent Data," Assigning Constituent Types, page 168](#)

PeopleSoft 8 SP1 Student Records PeopleBook, "Graduating Students"

[Appendix A, "PeopleSoft Contributor Relations Reports," PeopleSoft Contributor Relations Reports: Selected Reports, page 575](#)

Maintaining Degree Information

This section discusses how to maintain degree information.

The system enables you to enter and track external degree information, or information about degrees earned from institutions other than your own. In addition, you can view information about both internal and external degrees.







Pages Used to Maintain Degree Information

Page Name	Object Name	Navigation	Usage
External Degrees	AV_EXT_DEGR, AV_EXT_DEGR_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage People, Use, External Degrees • Manage Contributor Relations, Manage People, Workset, External Degrees 	Add information about degrees a constituent earned at institutions other than your own.
Internal Degrees	AV_INT_DGR_INQ, AV_INT_DGR_INQ_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage People, Inquire, Academic Information, Internal Degrees • Manage Contributor Relations, Manage People, Workset, Academic Information, Internal Degrees 	View information about degrees a constituent has earned from your institution.
Internal Legacy Degrees	AV_LEGACY_DEG_INQ, AV_LEGACY_DEG_INQ_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage People, Inquire, Academic Information, Internal Legacy Degrees • Manage Contributor Relations, Manage People, Workset, Academic Information, Internal Legacy Degrees 	View information about degrees a constituent earns at your institution. Legacy degree information is information that's converted from your previous system. Therefore, a complete academic record will not exist in the Student Administration system for these degrees.
External Degrees	AV_EXT_DEGREE, AV_EXT_DEGREE_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage People, Inquire, Academic Information, External Degrees • Manage Contributor Relations, Manage People, Workset, Academic Information, External Degrees 	View information about degrees a constituent earns at institutions other than your own.
Preferred Class Year	AV_INT_DEGREE	Manage Contributor Relations, Manage People, Use, Class Year, Preferred Class Year	Enter a constituent's class year at your institution. Preferred year displays on pages throughout the system when a person is the Level 0 key.

Page Name	Object Name	Navigation	Usage
Internal Legacy Degrees	AV_LEGACY_DEG	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage People, Use, Class Year, Internal Legacy Degrees • Manage Contributor Relations, Manage People, Workset, Class Year, Internal Legacy Degrees 	Enter information about degrees earned at your institution without setting up the entire academic structure for each degree.

Maintaining External Degree Information

Access the External Degrees page.

External Degrees					
Gallegher, Shawn		ID:	AV0001		
Constituent Type:	Alumni	Yr:	2001	Institution:	PSUNV
Academic History					
View All			First 1 of 1 Last		
*Org ID:	000010120		Lewis-Clark State College		
			<input type="button" value="+"/> <input type="button" value="-"/>		
External Degrees					
View All			First 1 of 1 Last		
*Degree Nbr:	1	*Degree Date:		*Data Source:	School
			<input type="button" value="+"/> <input type="button" value="-"/>		
Degree:					
*Honors Category:	None				
*Degree Status:	Complete				
External Subject Area 1	/ Field of Study 1:				
External Subject Area 2	/ Field of Study 2:				
<hr/>					
External Career:		Data Nbr:			
Trans Date:		Trans Type:		Status:	
Org Primary Location					

External Degrees page

Org ID Select the institution from which the external degree was earned.

Degree Nbr (degree number) This value is automatically calculated by the system. The first record you enter has a Degree Number of 1, the next 2, and so on.

Data Source Select the name of the organization from which you obtained information about the degree. Data source values are delivered with your system as translate values. You can modify these translate values.

Degree Select the type of external degree received or in progress. Degrees are defined on the Degree Table page.

Note. To enter a degree that is not defined in the Degree Table, leave the Degree field blank, and type in the appropriate information in the Description field.

Honors Category	If the person received an honor for this degree, select the appropriate value. Honors categories are delivered with your system as translate values. You can modify these translate values.
Degree Status	Select the current state of the degree. Degree statuses are delivered with your system as translate values. You can modify these translate values.
External Subject Area/Field of Study	If there are particular subject areas or fields concentrated on for this degree, enter them in these fields. You may prompt on these fields to bring up values defined in the External Subject Table. Or, if you prefer to enter an external subject area not defined in your system, leave the field blank, TAB to the related description field, and enter any text desired.
External Career	Select any external careers for the constituent. External careers are delivered with your system as translate values. You can modify these translate values.
Data Nbr (data number)	If this degree information is related to a particular transcript or source of information, enter the data number of the transcript or other source, from the External Data page. You cannot make a link to a data number until External Data page has been saved.
Org Primary Location	Click to view the primary address of the school to which this degree is related. On that page, click the Detail button to view additional information regarding the school.

Setting a Constituent's Preferred Year

Access the Preferred Class Year page.

Preferred Class Year

Internal Legacy Degrees

Gallagher, Shawn
ID: AV0001

Constituent Type: Alumni
Yr: 2001
Institution: PSUNV

Preferred Class Yr: 2001
Alumnus Type: Undergrad

Academic Progress
View All
First
1 of 4
Last

Career: Undergraduate
Campus: Walnut Creek Campus
Acad Prog: Liberal Arts Undergraduate

Academic Plan
View All
First
1-2 of 2
Last

Plan Type	Degree	Description	Confer Date	Degr Stat
Major	BA	Classics-BA	05/23/2001	Awarded
Minor	BA	Music Minor	05/23/2001	Awarded

Class Year - Preferred Class Year page

Preferred Class Yr (preferred class year)

Enter the year the constituent wants to use as his or her class year. For example, a constituent with both an undergraduate and graduate degree may prefer to use his or her graduate degree as the preferred year. This year displays on many pages throughout the system.

Alumnus Type

Select the constituent's alumnus type. This field supports Part IV of the CAE report.











The values for this field are shipped with your system. Values are displayed in the following table:

Guardian_Relation	Xlatshortname
G	Graduate
N	Non-Degree
U	Undergrad

Additional information about the constituent's academic career at your institution displays on this page.

Entering Internal Legacy Degree Information

Access the Internal Legacy Degrees page.

Preferred Class Year		Internal Legacy Degrees	
Gallegher,Shawn		ID: AV0001	
Constituent Type: Alumni	Yr: 2001	Institution: PSUNV	
Internal Legacy Degrees View All First 1 of 1 Last			
Class Year: 1998	Attended From: 1993	To: 1998	 
Degree: BE 	Bachelor of Engineering		
Major: M00013 	Computer Science		
Major 2: 			
Minor: M00014 	Management Information Systems		
Minor 2: 			
Campus: MAIN 	Main Hacienda Campus		
Acad Org: LIBARTS 	College of Liberal Arts		
Distinction:	<input type="text"/>		

Class Year - Internal Legacy Degrees page

Enter the Class Year, Attended From and To dates, Degree, Major, Major 2, Minor, Minor 2, Campus, Academic Organization, and any Distinction earned with the degree.

Note. The information on this page is stored in your PeopleSoft Student Records system.

Maintaining Work Experience Information

This section discusses how to maintain a constituent's work experience information.

Pages Used to Maintain Work Experience Information

Page Name	Object Name	Navigation	Usage
Work Experience	AV_EMPL_HIST, AV_EMPL_HIST_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage People, Inquire, Work Experience • Manage Contributor Relations, Manage People, Workset, Work Experience 	View information about a constituent's current and past employment.
Employment History Detail	AV_EMPL_HIST_SP	Click the Detail link on the Work Experience page.	View detailed information about an employee's record.
Organization Locations	AV_ORG_LOC_DTL_SP	Click the Locations button on the Employment History Detail page.	View information about an organization's physical locations.
Phone Detail	AV_EMP_PHONE_SP	Click the Phones button on the Employment History Detail page.	View a list of all the valid phone numbers for an organization.
Email/URL	AV_EMP_EMAIL_SP	Click the Email/URL button on the Employment History Detail page.	View the email addresses and URL addresses for an organization.

Adding Organizations

Use the Organization Table component to add external organizations to your system.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Adding Organizations to Your Database”

Entering Location Data for Organizations

Use the Organization Location component to enter information regarding the addresses and phone numbers of the organizations in your system. Organization locations should be entered before organization departments and organization contacts.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Organization Data,” Entering Organization Location Data

Entering Department Data for Organizations

Use the Organization Departments component to record information at the department level for an organization. Organization departments should be entered after organization locations and before organization contacts.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Organization Data,” Entering Organization Department Data

Entering Contact Data for Organizations

Use the Organization Contacts component to maintain information about the contacts your institution uses at a particular organization. You may have several contacts at one organization that are used for specific purposes such as a Matching Gift contact and a Community Relations contact.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Organization Data,” Entering Organization Contact Data

Maintaining Organization Financial Information

This section discusses how to maintain organization financial information.

Page Used to Maintain Organization Financial Information

Page Name	Object Name	Navigation	Usage
Organization Financial Info (organization financial information)	AV_ORG_FIN_INFO, AV_ORG_FIN_INFO_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Organizations, Use, Organization Financial Info • Manage Contributor Relations, Manage Organizations, Workset, Organization Financial Info 	Maintain information about an organization’s financial history and other statistical information.

Using the Organization Financial Info Page

Access the Organization Financial Info page.

Organization Financial Info

Ford Motor Company ID: AV1000

Constituent Type: Foundation Institution: PSUNV

Organization Information

Employee Count: 63575 *Cnst Type: 12 Foundation

Alumni Count: 0 Stck Exch: NYSE Symbol: FOMOCO

Description: SIC:

Financial Information View All First 1 of 1 Last

Fiscal Year: 1998 From Date: 01/01/1998 To Date: 12/31/1998

Revenue Amount: 10.00 CAD Assets Amount: 20.00

Expenses Amount: 30.00 Liability Amount: 40.00

Profit/Loss Amount: -20.00 Equity Amount: -20.00

Source Description: Contributions Total: 0.00 USD

Date:

Organization Financial Info page

- Employee Count** Enter the number of people currently employed at the organization.
- Alumni Count** Displays the total number of alumni who are employees of the organization.
- Stck Exch (Stock Exchange)** Select the name of the Stock Exchange in which the organization's stock trades, if applicable. Values for this field are *AMEX*, *NASDAQ*, and *NYSE*.
- Symbol** Enter the Stock Exchange symbol under which the organization's stock trades, if applicable. You can enter up to 10 characters.
- Description** Enter a description of the organization and the type of business it runs. You can enter up to 30 characters.
- SIC** Select the Standard Industrial Code for the organization.
- Fiscal Year** Enter the four-digit fiscal year for which you are recording financial information.
- From Date/To Date** Select the from date and to dates that define the fiscal year you selected. Fiscal year should reflect the organization's fiscal year and not necessarily that of your institution.
- If information on this page is entered in a currency other than base currency, conversion is calculated based upon the exchange rates on the to date.
- Revenue Amount** Enter the total amount the organization received in revenues during the fiscal year.
- Base** Click to convert the amounts on this page to your institution's base currency. The values convert using the exchange rate in effect on the date you selected and the button label changes to Entry. Click the button again to toggle back to entry mode, where you can change the values.



	Click to access the Display In Other Currency Page, where you can view the amount in another currency and obtain exchange rate information.
Expense Amount	Enter the total amount the organization incurred as expenses during the fiscal year.
Profit/Loss Amount	The organization's profit or loss for the fiscal year you selected based on revenue minus expenses.
Assets Amount	Enter the total worth of all assets held by the organization during the fiscal year.
Liability Amount	Enter the total amount of all liabilities owed by the organization during the fiscal year.
Equity Amount	Displays the organization's total equity for the fiscal year you entered, based on assets minus liability.
Source Description and Date	Enter the person or publication providing organization financial information to your institution and the date on which organization financial information was obtained.
Contributions Total	Enter the total amount of all contributions made by the organization to your institution as well as other entities during the fiscal year.

Defining an Organization's Matching Gift Rules

Use the Matching Rules component to define the matching gift rules for an organization. You can maintain information about minimum match amounts and match ratios, the designations for which gifts can be matched, the annual matching gift budget, required information and contacts, and any matching gift restrictions the organization has.

See Also

[Chapter 12, "Setting Up Commitment Management," Defining an Organization's Matching Gift Rules, page 132](#)

Viewing an Organization's Matching Gift Rules

Use the Matching Rules inquiry component to view the matching gift rules for an organization. You can view information about minimum match amounts and match ratios, the designations for which gifts can be matched, the annual matching gift budget, required information and contacts, and any matching gift restrictions the organization has.

See Also

[Chapter 23, "Processing Commitments and Analyzing Giving History," Viewing an Organization's Matching Gift Rules, page 472](#)

Reviewing Organization Data

Once you have entered the organization, location, department, and contact information for an organization, you can review that information quickly and easily through PeopleSoft Campus Community pages.

See Also

PeopleSoft 8 SPI Campus Community Fundamentals PeopleBook, “Managing Organization Data,” Reviewing Organization Data

Viewing an Organization’s Employee List

This section discusses how to view an organization’s constituent list.

Page Used to View an Organization’s Employee List

Page Name	Object Name	Navigation	Usage
Employee List	AV_EMPL_LIST_E, AV_EMPL_LIST_W	<ul style="list-style-type: none">• Manage Contributor Relations, Manage Organizations, Inquire, Employee List• Manage Contributor Relations, Manage Organizations, Workset, Employee List	View a list of all the constituents in the system employed by an organization. You can view both current and historical lists of an organization’s employees.

Viewing Employee Lists

Click the Details button to view detailed information about a specific employment record on the Employment History Detail Page.

You can build a workset from this page.

See Also

[Chapter 3, “General Functions Used Throughout the System,” Building a Workset From a Page in the System, page 39](#)

Viewing Profiles

This section discusses how to view profiles.

Profiles for both people and organizations provide you a means by which to view a summary of information contained in the system about a particular constituent. Your system includes both a Person Profile and an Organization Profile page.

Note. This section contains updated functionality related to Update ID #112126 that was posted to Customer Connection in November 2002.

Understanding Person Profile Views

Each profile view contains several data regions with summary information. The table below lists each data region and the profile view that contains it.

Data Region	Profile View
Address	Biographic
Phone/Email	Biographic
Biographic Information	Biographic
Work Experience	Biographic
Relationships	Biographic
Lifetime Giving	Commitment
Historical Giving	Commitment
Involvement	Participation
Volunteer Activities	Participation
Memberships	Participation

As you collapse and expand each profile view, the system populates the data regions within them.

Pages Used to View Profiles

Page Name	Object Name	Navigation	Usage
Person Profile	AV_PRSN_PROFILE, AV_PRSN_PROFILE_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage People, Inquire, Person Profile • Manage Contributor Relations, Manage People, Workset, Person Profile • Outreach, Outreach Officer, View Prsn, Person Profile • Outreach, Outreach Officer, View Lists, Person Profile 	View summary information about a constituent who is a person, without having to navigate through the menus in the system.
Organization Profile	AV_ORG_PROFILE, AV_ORG_PROFILE_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Organizations, Inquire, Organization Profile, Organization Profile • Manage Contributor Relations, Manage Organizations, Workset, Organization Profile 	View summary information about a constituent that is an organization.
Primary Location	AV_ORG_PROFILE2, AV_ORG_PROFILE2_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Organizations, Inquire, Organization Profile, Primary Location • Manage Contributor Relations, Manage Organizations, Workset, Organization Profile, Primary Location 	View an information about an organization's primary location.

Viewing General Person Profile Information

Access the Person Profile page. The default settings that determine what you see—which profile views expand, as well as the address, phone, and email views that appear—are defined on the Operator Defaults page.

Person Profile

Shaqua Johnson
ID: AV0020

Constituent Type: [Alumni](#)
Year: [1977](#)
Institution: PSUNV
[FERPA](#)

Profile View:

[Printer Friendly Version](#)

☐ Clearance Required

Prospect Manager: [Alan Franken](#)

Person Profile page (1 of 4)

Common Fields

Some fields on this page are not dependent on which profile view is expanded. The system always displays the following information at the top of the page: constituent name, ID, constituent type, class year, institution, spouse button (if a spousal relationship exists), and 3Cs buttons.

Constituent Type	Click to access the Constituent Type Summary page, which lists all types assigned to a constituent.
Year	<p>If academic information exists for the constituent in the system, the class year appears as a hyperlink. Click the link to access the Academic Information inquiry component.</p> <p>If no class year exists, but the system has academic information for the constituent, <i>None</i> appears here as a hyperlink. Click the link to access the Academic Information inquiry component.</p>
FERPA	Click to access the FERPA display component, which lists the constituent's personal data and specifies which information is releasable.
Profile View	Select a profile view— <i>Biographic</i> , <i>Commitment</i> , or <i>Participation</i> —to expand it below and populate its data regions. Click the arrowhead next to the region's name to manually expand or collapse data regions.
Printer Friendly Version	<p>Click to access a read-only version of the page that expands all rows of all populated data regions. You can print this page using your browser's print functionality.</p> <p>Click the <i>Return</i> button to return to the Person Profile page.</p>
Expand All, Collapse All	Click to either expand or collapse all data regions below.
Clearance Required	If this check box is selected, clearance is required before contacting the constituent. Clearances are set on the Clearance page.
Prospect Manager	<p>Displays the name of the constituent's assigned prospect manager. Prospect managers are assigned on the Staff Assignment, Volunteer Assignment, and Unit Assignment pages.</p> <p>If the prospect manager has an active email address on the Electronic Addresses page, the name appears as a hyperlink. Click the link to launch your email application and send a message to that person.</p>

Additional Information

The system displays messages at the bottom of the page based on the following conditions.

Note. Where no data exists, the system hides the data region.

Data Region	Condition	Message
Membership	No data exists	No Membership History on file
	Data exists but user does not have access to the Person Membership History page from any menu	Membership History on file
Lifetime Giving Historical Giving	No data exists	No Giving Information on file
	Data exists but user does not have access to the Person Giving Profile page from any menu	Giving Information on file
Work Experience	No data exists	No Work Experience on file
Relationships	No data exists	No Relationship information on file
Involvement	No data exists	No Involvement information on file
Volunteer Activities	No data exists	No Volunteer Activity information on file

The system also displays messages in this area related to the following information.

Additional information	Condition	Message
Academic Information	No data exists and the Class Year hyperlink is inactive	No Academic Information on file
Planned Giving	No data exists	No Planned Giving Donor information on file
	Data exists	Planned Giving Donor information on file
Ratings	No data exists	No Ratings information on file
	Data exists	Ratings information on file

Additional information	Condition	Message
Assigned Resources	No data exists	No Resources are assigned to constituent
	Data exists	Resources are assigned to constituent

See Also

PeopleSoft 8 SPI Campus Community Fundamentals PeopleBook, “Managing FERPA”

Viewing a Biographic Profile

Access the Person Profile page, Biographic profile view.

▼ Address Address Type: Home 389 Rose Street Oakland, CA 94609, USA		▼ Phone / E-mail Phone Type: Home <input type="checkbox"/> Preferred Telephone: Ext: Email Type: Home <input type="checkbox"/> Preferred Email Address: Shaqua.Johnson@hotmail.com	
▼ Biographic Information			
Birthdate:	10/20/1959	Date of Death:	
Ethnic Group:	White	Religious Preference:	
Marital Status:	Married	Spouse:	Sally Randle
Gender:	Male	Military Status:	Not Indic.
▼ Work Experience View All First 1 of 1 Last			
Employer	Job Title	Start Date	End Date
Ford Motor Company	Senior Business Analyst	03/15/1993	
▼ Relationships View All First 1-3 of 5 Last			
Name	Relationship	Status	Constituent Type
Randle,Sally	Spouse	Joint A	Alumni
Crosbie,Edward	Roommate	A	Alumni
Carroll,James	Friend	A	Alumni
			Year
			1999
			1966
			1953

Person Profile page (2 of 4)

The following table lists the information sections in this view and the pages from which the system derives the information.

Information Section	Page
Address	Addresses
Phone/Email	Phone Numbers Electronic Addresses
Biographic Information	Bio/Demo Data Religious Preferences Relationships Decedent Data
Work Experience	Work Experience
Relationships	Relationships Person to Org Relationships

Address

Address Type Select the type of address you want to display.

Phone/Email

Phone Type, Email Type Select the types of phone and email address information you want to display.

Email Address If the constituent has an active email address in the system, it appears as a hyperlink. Click the link to launch your email application and send a message to the constituent.

Biographic Information

This data region displays compiled biographic data, including date of death.

Date of Death If the constituent is deceased, and there is a date of death on the Decedent Data page, the system displays it here.

Work Experience

Employer Click a link to access the Employment History Detail page for the constituent.

Relationships

Relationship Click a link to access the Relationship Detail page for the constituent.

Note. If an existing relationship is a *Joint* relationship, it is noted next to the Relationship link.

See Also

[Chapter 13, “Managing Constituent Data,” Maintaining Work Experience Information, page 176](#)

[Chapter 4, “Setting Up Constituent Data,” Establishing Relationships, page 47](#)

Viewing a Commitment Profile

Access the Person Profile page, Commitment profile view.

▼ Lifetime Giving			
Lifetime Commitments	10,062.50	USD	Lifetime Hard Credits: 10,062.50
Lifetime Open Pledges:	0.00		Largest Pledge: 0.00
Lifetime Gifts/Payments:	10,062.50		Largest Gift: 4,000.00
▼ Historical Giving			
Total Year-to-Date Giving	4,062.50		First Gift Year: 1999
Total Prior Year Giving:	3,000.00		Total Years Giving: 4
Last Gift Date:	11/18/2002		Consecutive Years Giving: 4
Last Gift Amount:	62.50		

Person Profile page (3 of 4)

The system derives information for the Commitment profile view from the Giving Profile page.

Lifetime Giving

Lifetime Commitments Click to access the Giving Profile page for the constituent.

Historical Giving

Total Year-to-Date Giving Click to access the Giving Profile page for the constituent.

See Also

[Chapter 23, “Processing Commitments and Analyzing Giving History,” Analyzing Giving History, page 484](#)

Viewing a Participation Profile

Access the Person Profile page, Participation profile view.

▼ Involvement					View All	First	1-3 of 6	Last
Involvement Type	Involvement Category	Involvement	Start Date	End Date	Received Date			
Activity	Academic	Marching Band	09/12/1973	12/30/1976				
Affiliation	Political	Democratic Party						
Award/Honor	Charitable	United Way	06/12/1998					
▼ Volunteer Activities					View All	First	1-3 of 3	Last
Volunteer Activity	Volunteer Role	Start Date	End Date	Years of service				
	Event Host	03/15/1997	04/30/1998	1 year 1 month 16 days				
Member Phonathon	Coordinator	01/01/2002	10 months 18 days					
	Vice-Chairperson	03/15/1998	4 years 8 months 4 days					
▼ Memberships					View All	First	1-2 of 2	Last
Membership Organization	Membership Number	Business Unit	Level	Membership Type	Start Date	Expiration Date		
ALUMASSN	52	PSUNV	Life Member	LIFE	11/18/2002			
FINE ARTS	51	PSUNV			11/18/2002			

Person Profile page (4 of 4)

The following table lists the information sections in this view and the pages from which the system derives the information.

Information Section	Page
Involvement	Involvement Summary
Volunteer Activities	Volunteer History
Membership	Membership History Prsn (membership history person)

Involvement

Involvement

Click a link to access the Involvement Detail page for the constituent.

Volunteer Activities

Volunteer Role

Click a link to access the Volunteer Assignment Detail page for the constituent.

Memberships

Membership Organization

Click a link to access the Membership Detail page for the constituent.

If business unit security is active, the system only displays member organizations for accessible business units.

See Also



[Chapter 13, “Managing Constituent Data,” Maintaining Involvement Information, page 192](#)

[Chapter 19, “Managing Volunteers,” Viewing Volunteer History, page 358](#)

[Chapter 18, “Managing Membership,” Viewing Membership History, page 346](#)

Viewing an Organizational Profile

Access the Organization Profile page.

Organization Profile		Primary Location	
Ford Motor Company		ID: AV1000	 
Constituent Type: Foundation		Institution: PSUNV	
Organization Type:	Business	Parent Organization:	
Proprietorship:	Private	Parent ID:	
Stock Exchange:	NYSE	Employee Count:	63,575
Symbol:	FOMOCO	Alumni Count:	0
SIC:		Financial Information View All First 1 of 1 Last	
<input type="checkbox"/> Assigned	<input checked="" type="checkbox"/> Relationships	Fiscal Year: 1998	
<input checked="" type="checkbox"/> Donor	<input checked="" type="checkbox"/> Involvement	From Date: 01/01/1998	
<input type="checkbox"/> Matching Gift	<input checked="" type="checkbox"/> Ratings	To Date: 12/31/1998	
<input checked="" type="checkbox"/> Subsidiaries		Revenue Amount: 10.00 CAD	
		Expenses Amount: 30.00	

Organization Profile - Organization Profile page

Assigned	If selected, indicates that the organization is assigned to one or more staff member, volunteer, or unit.
Donor	If selected, indicates that the organization has made at least one monetary donation to the institution.
Matching Gift	If selected, indicates that the organization matches gifts.
Subsidiaries	If selected, indicates that the organization has subsidiaries.
Relationships	If selected, indicates that the organization has relationships established with other constituents in the system.
Involvement	If selected, indicates that information exists in the system about the organization's interests, activities, affiliations, and awards and honors.
Ratings	If selected, indicates that information exists in the system about prospect ratings of the organization.

See Also

[Chapter 13, “Managing Constituent Data,” Maintaining Organization Financial Information, page 178](#)

Updating a Donor's Record/Adding a Donor

Use the Update Information pages to either update an existing donor's record or add a new donor to the system.

See Also

[Chapter 22, "Entering Commitments," Updating or Adding a Constituent Who Is a Person, page 391](#)

[Chapter 22, "Entering Commitments," Updating or Adding a Constituent Who Is an Organization, page 392](#)

Viewing a Constituent's Audience History

This section discusses how to view constituent audience history.

Note. There is an Update Information page for donors who are people and an Update Information page for donors who are organizations.

Page Used to View a Constituent's Audience History

Page Name	Object Name	Navigation	Usage
Audience History	AV_AUD_HISTORY, AV_AUD_HISTORY_E	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage People, Inquire, Audience History • Manage Contributor Relations, Manage Organizations, Inquire, Audience History • Manage Contributor Relations, Manage Prospects, Inquire, Audience History 	<p>Assess the ways in which a constituent is being solicited. This page displays all the target audiences to which the constituent belongs.</p> <p>Audiences are defined for both initiatives and membership organizations, and are based on a variety of attributes. For example, an audience might consist of all constituents who have an involvement of <i>GOLF</i>.</p>

Reviewing Audience History

Access the Audience History page.

Audience History

Gallegher, Shawn

ID: AV0001

Yr: 2001

Institution: PSUNV

Constituent Type: Alumni

*Time Frame:

Current

Refresh...

Audience	Audience Type	Initiative	Initiative Type	Start Date	End Date
1 CLASS 49	Reporting	A&S99	CAMPAIGN	03/12/2001	
2 CLASS 49	Reporting	CSVCS	VOLUNTEER	03/12/2001	
3 CLASS 49	Reporting	HC99	EVENT	03/12/2001	
4 CLASS 49	Reporting	MERGERS	OTHER	03/12/2001	
5 CLASS 49	Reporting	MGAM99	MEMBERSHIP	03/12/2001	
6 CLASS 49	Segmentatn	50YRBANQ	EVENT	03/12/2001	
7 CLASS 49	Segmentatn	A&S99	CAMPAIGN	03/12/2001	

Audience History page

Audience	Lists the name of the initiative audience to which the constituent belongs.
-----------------	---

Audience Type	Indicates whether the audience is for the purpose of <i>Administration</i> , <i>Segmentation</i> , or <i>Reporting</i> .
----------------------	--

Initiative	Lists the name of the initiative to which the audience is associated.
------------	---

Initiative Type	Indicates whether the initiative is a campaign, volunteer effort, event, membership effort, or other type.
------------------------	--

Maintaining Involvement Information

This section provides an overview and discusses how to maintain involvement information.

Understanding Involvement

The Involvement component of PeopleSoft Contributor Relations enables you to maintain information about a constituent's activities, affiliations, interests, and awards and honors. When you create an involvement record, you identify the involvement type, a description of the involvement, a category such as charitable or political, an institution, and start and end dates.

Pages Used to Maintain Involvement Information

Page Name	Object Name	Navigation	Usage
Involvement	AV_INVLV, AV_INVLV_E, AV_INVLV_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage People, Use, Involvement • Manage Contributor Relations, Manage Organizations, Use, Involvement • Manage Contributor Relations, Manage People, Workset, Involvement • Manage Contributor Relations, Manage Organizations, Workset, Involvement 	Add new involvement records for a constituent.
Involvement Filter	AV_INVLV_FLTR, AV_INVLV_FLTR_E, AV_INVLV_FLTR_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage People, Inquire, Involvement Summary, Involvement Filter • Manage Contributor Relations, Manage Organizations, Inquire, Involvement Summary, Involvement Filter • Manage Contributor Relations, Manage People, Workset, Involvement Summary, Involvement Filter • Manage Contributor Relations, Manage Organizations, Workset, Involvement Summary, Involvement Filter 	Narrow the types of involvement you view on the Involvement Summary page.

Page Name	Object Name	Navigation	Usage
Involvement Summary	AV_INVLV_SMRY, AV_INVLV_SMRY_E, AV_INVLV_SMRY_W	<ul style="list-style-type: none"> Click the Search button on the Involvement Filter page. Manage Contributor Relations, Manage People, Inquire, Involvement Summary, Involvement Summary Manage Contributor Relations, Manage Organizations, Inquire, Involvement Summary, Involvement Summary Manage Contributor Relations, Manage People, Workset, Involvement Summary, Involvement Summary Manage Contributor Relations, Manage Organizations, Workset, Involvement Summary, Involvement Summary 	View a list of the involvement records matching the filter criteria you specify on the Involvement Filter page.
Involvement Detail	AV_INVLV_DTL_SP	<ul style="list-style-type: none"> You can access the Involvement Detail page through multiple navigation paths. Below is the most frequently used path. Click the Detail link on the Involvement Summary page. 	View additional information about an involvement record.
Roster Filter	AV_I_INVLV_FLTR	<ul style="list-style-type: none"> Manage Contributor Relations, Manage Organizations, Inquire, Involvement Roster, Roster Filter Manage Contributor Relations, Manage People, Inquire, Involvement Roster, Roster Filter 	Create a list of all the constituents who share common involvement. For example, you can generate a list of the constituents who participated in the Annual 10K Walk on your campus, or a list of those constituents with an interest in golfing.
Roster List	AV_I_INVLV_SMRY	<ul style="list-style-type: none"> Manage Contributor Relations, Manage Organizations, Inquire, Involvement Roster, Roster List Manage Contributor Relations, Manage People, Inquire, Involvement Roster, Roster List 	View a list of the constituents who share a common involvement based on the selections you made on the Involvement Roster page.

Adding Involvement Records

Access the Involvement page.

The screenshot shows the 'Involvement' page in a software application. The page has a header with the title 'Involvement' and a search icon. Below the header, there is a form for adding a new involvement record. The form includes the following fields:

- *Involvement Type:** Activity (dropdown menu)
- *Involvement Category:** Charitable (dropdown menu)
- *Involvement:** UNWAY (text field with a search icon) United Way
- Institution:** PSUNV (text field with a search icon) PeopleSoft University
- Start Date:** 06/01/1998 (calendar icon)
- End Date:** (empty text field with a calendar icon)
- Rcvd Dt:** (empty text field)
- Source Description:** (empty text field)
- Last Mod Dt:** 07/26/1998

The form is titled 'Involvement' and has a 'View All' link and a 'First' button. The form is also titled 'Involvement' and has a 'View All' link and a 'First' button.

Involvement page

Involvement Type

Select an involvement type.

Interest: Areas in which the constituent has expressed an interest, but has not necessarily been an active participant.

Activity: Specific events or occurrences in which the constituent has participated.

Affiliation: The relationship between the constituent and a club, and so on. For example, the constituent is President of the Kiwanis Club.

Award and Honor: Specific instances in which the constituent has been awarded or honored.

Involvement Category

Select a category of involvement information such as professional, charitable, academic, social, religious, and so on.

Involvement

Select an involvement description from the available options, which are defined by your institution.

Institution

Indicate with which institution the involvement is associated.

Rcvd Date (received date)

If the involvement type is *Award and Honor* or another type that requires a received date rather than a date range, enter the date in the Rcvd Date field. Make this determination when defining involvement types.

Source Description

The person or publication that alerted you to the constituent's involvement.

Last Mod Dt (last modified date) The date on which this information was most recently updated.

Filtering Involvement Records

Access the Involvement Filter page.

The screenshot shows the 'Involvement Filter' page with the following details:

- Constituent:** Gallagher, Shawn
- ID:** AV0001
- Constituent Type:** Alumni
- Yr:** 2001
- Institution:** PSUNV (PeopleSoft University)
- *Time Frame:** Current
- Search:** [Yellow Search Button]

Below the search criteria are two filter sections:

- Involvement Type:** View All | First | 1 of 1 | Last. Includes a dropdown menu and +/- buttons.
- Involvement Category:** View All | First | 1 of 1 | Last. Includes a dropdown menu and +/- buttons.

Involvement Summary - Involvement Filter page

- Institution** Select the institution for which you want to view involvement information.
- Involvement Type** Select the involvement types about which you want to view information on the Involvement Summary page.
- Involvement Category** Select the involvement categories about which you want to view information on the Involvement Summary page. Involvement Categories describe the nature of the involvement.
- Search** Click to retrieve a list of the involvement records matching the criteria you selected on the Involvement Summary page.

Creating an Involvement Roster

Access the Roster Filter page.

Roster Filter **Roster List**

Institution: PSUNV PeopleSoft University

Involvement Type: Activity

Involvement Category: Charitable

Involvement Code: BAND

Person / Organization:

Start Date: From To

End Date:

Received Date:

Search

Involvement Roster - Roster Filter page

Involvement Type	Select the involvement type for which you want to create a roster. Valid involvement types are <i>Interest</i> , <i>Activity</i> , <i>Affiliation</i> , and <i>Award and Honor</i> .
Involvement Category	Select the involvement category for which you want to create a roster. Involvement Categories describe the nature of the involvement, such as <i>Professional</i> , <i>Political</i> , <i>Charitable</i> , and so on.
Involvement Code	Select the involvement code for which you want to create a roster. Involvement Codes describe the specific involvement, such as <i>Golf</i> , <i>Hunting</i> , <i>Dancing</i> , <i>Kiwanis Club</i> , and so on.
Search	Click to retrieve a list of involvement records that make up your roster on the Roster List page.

Note. The Maximum Retrieval value, set on the Institution Installation page, determines the maximum number of results returned per search.

You can build a workset from the records you retrieve on the Roster List page.

See Also

Chapter 3, “General Functions Used Throughout the System,” Building a Workset From a Page in the System, page 39

CHAPTER 14

Managing Prospects

This chapter provides an overview of prospect management, lists prerequisites, and discusses how to:

- Create resource assignments.
- Create prospect strategies.
- Track prospect information.
- Implement a prospect plan.

See Also

Chapter 5, “Setting Up Prospects,” page 55

Understanding Prospect Management

To effectively manage prospects, you must quickly evaluate constituents, create comprehensive cultivation-activity plans, and constantly monitor and revise those plans. PeopleSoft Contributor Relations enables you to do this by maintaining extensive prospect information and providing tools that you can use to effectively implement and manage cultivation plans.

You can assign prospects to the staff members, volunteers, and units that are responsible for prospect management. For each assignment that you create, you can assign an institution-defined role, or reason for the assignment. Roles are the undertakings (such as Prospect Manager, Campaign Manager, Solicitor, and so on) that are assumed by the assigned resources at your institution.

Prerequisites

Before you can assign staff members, volunteers, and business unit resources to manage prospects, you must first set them up and assign them to roles in your institution.

See Chapter 2, “Setting Up Your PeopleSoft Contributor Relations Framework,” Adding Resources, page 27.

Creating Resource Assignments

There are two ways to assign prospects to resources:

- Create *mass* assignments, where you assign a group of prospects to a particular resource and role.
- Create *individual* assignments, where you assign a single prospect to a resource.

This section lists common elements and discusses how to:

- Create mass staff assignments.
- Create mass unit assignments.
- Create mass volunteer assignments.
- Create individual staff assignments.
- Create individual volunteer assignments.
- Create individual unit assignments.
- View prospects assigned to a resource at your institution.
- View resource assignments.
- Generate the Role Assignments report.

Common Elements Used in This Section

Campaign Select an organized institutional effort (targeted to a specific constituency) that occurs over a specified period with specific purposes and goals. When you select a campaign, its description appears to the right of this field.

Role Select the role that the resource plays in the cultivation process. Roles are determined by your institution. Values include *PM* (Prospect Manager), *SOL* (Solicitor), and *CM* (Campaign Manager).

The list of available role values for each assignment is impacted by the selections you made in the Assignment Role Option group box on the CR Installation page.

Note. Each prospect can have only one resource at a time assigned to the *PM* role.

Pages Used to Create Resource Assignments

Page Name	Object Name	Navigation	Usage
Mass Assign Staff	AV_MASS_PRSN, AV_MASS_PRSN_WS	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Use, Mass Staff Assignments • Manage Contributor Relations, Manage Prospects, Workset, Mass Staff Assignments 	Assign groups of prospects to a staff member.

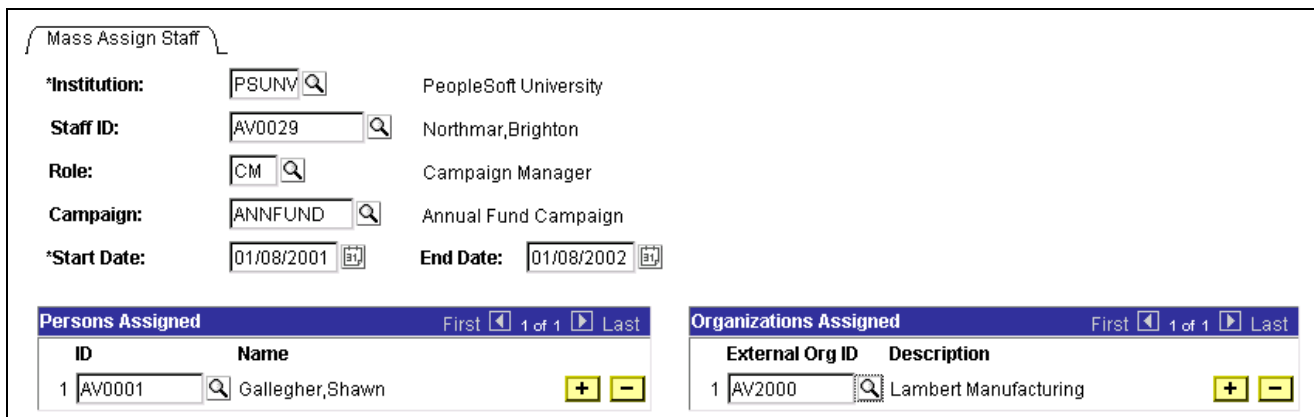
Page Name	Object Name	Navigation	Usage
Mass Assign Units	AV_MASS_UNIT, AV_MASS_UNIT_WS	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Use, Mass Units Assignments • Manage Contributor Relations, Manage Prospects, Workset, Mass Units Assignments 	Assign groups of prospects to a unit.
Mass Assign Volunteers	AV_MASS_VOL, AV_MASS_VOL_WS	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Use, Mass Volunteer Assignments • Manage Contributor Relations, Manage Prospects, Workset, Mass Volunteer Assignments 	Assign groups of prospects to a volunteer.
Staff Assignment	AV_STAFF_ASGN, AV_STAFF_ASGN_E, AV_STAFF_ASGN_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Use, Resource Assignments, Staff Assignment • Manage Contributor Relations, Manage Prospects, Use, Resource Assignments-Org, Staff Assignment • Manage Contributor Relations, Manage Prospects, Workset, Resource Assignments, Staff Assignment 	Assign individual prospects to a staff member.
Volunteer Assignment	AV_VOL_ASGN, AV_VOL_ASGN_E, AV_VOL_ASGN_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Use, Resource Assignment, Volunteer Assignment • Manage Contributor Relations, Manage Prospects, Use, Resource Assignments-Org, Volunteer Assignment • Manage Contributor Relations, Manage Prospects, Workset, Resource Assignments, Volunteer Assignment 	Assign individual prospects to a volunteer.

Page Name	Object Name	Navigation	Usage
Unit Assignment	AV_UNIT_ASGN, AV_UNIT_ASGN_E, AV_UNIT_ASGN_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Use, Resource Assignment, Unit Assignment • Manage Contributor Relations, Manage Prospects, Use, Resource Assignments-Org, Unit Assignment • Manage Contributor Relations, Manage Prospects, Workset, Resource Assignments, Unit Assignment 	Assign individual prospects to a unit.
Resource Filter	AV_RSRC_ASGN_INQ	Manage Contributor Relations, Manage Prospects, Inquire, Resource Assignments, Resource Filter	Select the individual resource, or type of resource, for which to view a list of assigned prospects.
Resource Assignments	AV_RSRC_ASGN_INQ2	Manage Contributor Relations, Manage Prospects, Inquire, Resource Assignments, Resource Assignments	View a list of the prospects who are assigned to the resource. Prospect assignments that meet the criteria that you selected on the Resource Filter page appear on this page.
Assignment Detail	AV_ASGN_INQ_DTL_SP	<ul style="list-style-type: none"> • You can access the Assignment Detail page through multiple navigation paths. The list below contains the most frequently used paths. • Click the Detail button on the Resource Assignments page. • Click the Detail button the Prospect Assignments page. 	View additional information about an assignment.
Prospect Assignments	AV_PRSP_ASGN_INQ, AV_PRSP_ASGN_INQ_E, AV_PRSP_ASGN_INQ_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Inquire, Prospect Assignments • Manage Contributor Relations, Manage Prospects, Inquire, Prospect Assignments-Org • Manage Contributor Relations, Manage Prospects, Workset, Prospect Assignments 	View a list of the resources that are assigned to a prospect for cultivation purposes at your institution. Assigned resources can include staff members, volunteers, and units.

Page Name	Object Name	Navigation	Usage
Role Assignments	AV_RUNCTL_ROLE	Manage Contributor Relations, Manage Prospects, Report, Role Assignments, Role Assignments	Set parameters for the assignments to view on the Role Assignments report.

Creating Mass Staff Assignments

Access the Mass Assign Staff page.



Mass Assign Staff page

This page provides a one-stop process for assigning a group of prospects to a resource for the same reason. When you create mass assignments, the system does the following:

- Generates an assignment record for each prospect in the group.
- Adds each prospect into the resource's MYPROS workset.

See [Chapter 26, “Working With Self-Service Outreach,” Initializing and Maintaining the My Prospects Workset, page 548.](#)

Institution

Select the institution associated with the resource that you are assigning.

Note. If your security access limits you to one academic institution, this field does not appear.

Staff ID, Volunteer ID, and Unit ID

Enter the ID of the resource for which you are creating mass assignments. Select a staff ID, volunteer ID, or unit ID, depending on the resource type that you are creating assignments for.

Role

The values selected in the Assignment Role Option portion of the CR Installation page impact the IDs available for this field.

If Defined was selected on the CR Installation page, only roles assigned to the selected ID appear here.

If Class was selected, only roles for the ID type selected (staff, volunteer, or unit) appear here.

If All was selected, all roles defined in the system appear here, regardless of their ID or type.

Workset Code

If you are entering mass assignments for a workset, enter the workset code for the workset to which to apply the assignment. The IDs and names of each constituent in the workset appear in the lower portion of this page.

Persons Assigned

ID and Name

Identify each prospect to be assigned to the resource and role that you selected. When you enter an ID, the name appears.

Organizations Assigned

External Org ID (external organization ID) and Description

Identify each external organization to be assigned to the resource and role that you selected. When you enter an ID, its description appears.

Workset Members

ID and Name

When you select a workset code, the ID or name of each constituent in the workset appears.

Creating Mass Unit Assignments

Access the Mass Assign Units page.

Mass Assign Units

*Institution:

PSUNV

PeopleSoft University

Unit Code:

ALUMREL

Alumni Reunions Team

Role:

SOL

Solicitor

Campaign:

ANNFUND

Annual Fund Campaign

*Start Date:

01/08/2001

End Date:

01/08/2002

Persons Assigned

First 1 of 1 Last

ID

Name

1 AV0001 Gallagher,Shawn

+

-

Organizations Assigned

First 1 of 1 Last

External Org ID

Description

1 AV2000 Lambert Manufacturing

+

-

Mass Assign Units page

This page provides a one-stop process for assigning a group of prospects to a particular unit for the same reason. When you create mass assignments, the system generates an assignment record for each prospect in the group. The process is the same as creating mass staff assignments.

See Also

Chapter 14, “Managing Prospects,” Creating Mass Staff Assignments, page 203

204

PeopleSoft Proprietary and Confidential

Creating Mass Volunteer Assignments

Access the Mass Assign Volunteers page.

Mass Assign Volunteers

***Institution:** PSUNV PeopleSoft University
Volunteer ID: AV0007 Whittey,Christopher
Role: CMB Committee Member
Campaign: ANNFUND Annual Fund Campaign
***Start Date:** 01/08/2001 **End Date:** 08/01/2002

Persons Assigned		First	1 of 1	Last
ID	Name			
1 AV0001	Gallegher,Shawn	+ -		

Organizations Assigned		First	1 of 1	Last
External Org ID	Description			
1 AV1000	Ford Motor Company	+ -		

Mass Assign Volunteers page

This page provides a one-stop process for assigning a group of prospects to a particular volunteer for the same reason. When you create mass assignments, the system generates an assignment record for each prospect in the group.

See Also

Chapter 14, “Managing Prospects,” Creating Mass Staff Assignments, page 203

Creating Individual Staff Assignments

Access the Staff Assignment page.

Staff Assignment
Volunteer Assignment
Unit Assignment

Gallegher,Shawn ID: AV0001 Comments
Cnst Type: Alumni **Yr:** 2001 **Institution:** PSUNV

View All First 1 of 2 Last

***Staff ID:** AV0022 Capozzelli,Mario
+
-

View All First 1 of 1 Last

***Role:** PM Prospect Manager
+
-

Campaign: ANNFUND Annual Fund Campaign

***Start Date:** 07/24/1998

End Date:

☐ Spouse Link

Staff Assignment page

**Staff ID, Volunteer ID,
and Unit ID**

Depending on which page you access, enter the staff ID, volunteer ID, or unit ID for the resource that you are assigning to a prospect.

Spouse Link

Select to indicate that the prospect's spouse is to receive the same resource assignment. The assignment is made on the corresponding report and display pages, but is not included in the assignment totals of those pages.

Note. If this check box is unavailable for entry, one of the following is true:

- The prospect does not have a spousal relationship established in the system.
- The prospect or the prospect's spouse is deceased.

If you select this check box, the application copies the assignment to the spouse's record. If the assignment already exists on that record, only the link is established. If the assignment is for the role of Prospect Manager, the spouse cannot have another current Prospect Manager assignment. If a current Prospect Manager assignment exists on the spouse's record, an error message appears and the system will not copy the assignment.

Creating Individual Volunteer Assignments

Access the Volunteer Assignment page.

Staff Assignment Volunteer Assignment Unit Assignment

Gallegher, Shawn ID: AV0001 Comments
Cnst Type: Alumni Yr: 2001 Institution: PSUNV

View All First 1 of 1 Last

Volunteer ID: AV0007 Whitney, Christopher + -

View All First 1 of 1 Last

*Role: SEC Secretary/Treasurer + -

Campaign: EDUCATION College of Education Campaign

*Start Date: 08/10/1998

End Date:

☐ Spouse Link

Volunteer Assignment page

Although this page contains the same fields as the Staff Assignment page, volunteer assignment differs slightly. Volunteer IDs are not necessarily staff members; they are the IDs of people being assigned to a prospect or action in a role for a specified period of time.

Note. You must set up an ID on the Volunteers page in order for it to appear as a valid Volunteer ID on this page.

See Also

Chapter 14, “Managing Prospects,” Creating Individual Staff Assignments, page 205

Creating Individual Unit Assignments

Access the Unit Assignment page.

Staff Assignment Volunteer Assignment **Unit Assignment**

Gallegher, Shawn ID: AV0001 [Comments](#)
 Cnst Type: Alumni Yr: 2001 Institution: PSUNV

View All First 1 of 1 Last	
*Unit:	ALUMREL Alumni Reunions Team
*Role:	SOL Solicitor
Campaign:	ANNFUND Annual Fund Campaign
*Start Date:	11/10/2000
End Date:	
<input type="checkbox"/> Spouse Link	

Unit Assignment page

Although this page contains the same fields as the Staff Assignment page, unit assignment differs slightly. Unit IDs are groups, not individuals, assigned to a prospect or action in a role for a specified period of time.

Note. You must set up a unit on the Units page in order for it to appear as a valid Unit on this page.

See Also

Chapter 14, “Managing Prospects,” Creating Individual Staff Assignments, page 205

Viewing the Prospects Assigned to a Resource

Access the Resource Filter page.

Resource Filter

Resource Assignments

Institution:

PSUNV PeopleSoft University

Search

Assigned Resource:

Staff

Staff ID:

AV0022

Capozzelli,Mario

Role:

Time Frame:

Current

Resource Filter page

Once you have selected criteria on this page, you can view the list of prospects who are assigned to the resource that you selected on the Resource Assignments page.

- Assigned Resource

Select the type of resource to view assignments. Values are *Staff*, *Volunteer*, and *Unit*.

These values are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.
- Staff ID, Volunteer ID, and Unit ID

Select the ID for the resource whose prospect assignments you want to view. The label for this field depends on your selection in the Assigned Resource field. This field lists all of your institution’s resources of the selected type that have prospect assignments.
- Search

Click to retrieve a list of the prospects that match the criteria that you selected. The list of prospects matching your criteria appears on the Resource Assignments page.

Note. The Maximum Retrieval value, set on the Institution Installation page, determines the maximum number of results returned per search.

Viewing Resource Assignments

Access the Resource Assignments page.

Resource Filter

Resource Assignments

View All						First	1-5 of 5	Last
Select	Assigned Prospect	Assigned Resource	Role	Active	Details			
1	<input type="checkbox"/>	Lambert Manufacturing	Nicholson,Donald	Prospect Manager	<input checked="" type="checkbox"/>	Details		
2	<input type="checkbox"/>	Gallegher,Shawn	Capozzelli,Mario	Prospect Manager	<input checked="" type="checkbox"/>	Details		
3	<input type="checkbox"/>	Gallegher,Shawn	Perkins,Darla	Solicitor	<input checked="" type="checkbox"/>	Details		
4	<input type="checkbox"/>	Johnson,Shaqua	Franken,Alan	Prospect Manager	<input checked="" type="checkbox"/>	Details		
5	<input type="checkbox"/>	Randle,Sally	Franken,Alan	Prospect Manager	<input checked="" type="checkbox"/>	Details		

All

Workset:

Descr:

Build

Resource Assignments page

Assigned Prospect	Displays the name of the donor prospect for which a resource assignment exists.
Assigned Resource	The name of the staff member, volunteer, or unit assigned to the prospect.
Role	The function of the resource assigned such as <i>Prospect Manager</i> or <i>Solicitor</i> .
Active	Indicates that the resource assignment is currently active.
Details	Click this link in any row to view detailed information about the prospect's assignment on the Assignment Detail page.

You can build a workset from this page.

See Also

Chapter 3, "General Functions Used Throughout the System," Building a Workset From a Page in the System, page 39

Generating the Role Assignments Report

Access the Role Assignments page.

Role Assignments page

You can select an institution, assigned resource type, time frame, role, sort order, and type of report.

Institution Select the institution for which to generate a report. The report contains information about assignments only for the institution that you select.

Assigned Resource Select the resource type for which to generate a list of assignments. You can select *Staff*, *Volunteer*, or *Unit*.

The values in this field are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Sort By Select the sort order for the list of resources displayed on the report. You can sort by *Count*, *ID*, or *Name*.

Sorting by Count means the Role Assignments report will order the staff IDs by the highest number of assignments.

Sorting by ID means the report will list the staff by their ID numbers.

Sorting by Name means the report will list the staff in alphabetical order.

Note. The Sort By and Sort Order field values will appear on the report, so you'll know how you chose to sort this information.

The sort by values are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Sort Order Specify whether to view the information on the report in *Ascending* or *Descending* order.

Sorting in Descending order means the Sort By field values will appear from highest to lowest. Ascending order means the values will appear from lowest to highest.

Report Type

Select the type of report to generate:

Summary: Produces a one-page report that includes the ID and name of the assigned resource and the number of assignments he or she has that meet the parameters that you set for the report.

Detail: In addition to the one-page summary, produces a separate page for each resource that includes the ID and name of each prospect assigned, the associated campaign, start date, end date, and whether the spouse's record is linked.

See Also

Appendix A, "PeopleSoft Contributor Relations Reports," PeopleSoft Contributor Relations Reports: Selected Reports, page 575

Creating Prospect Strategies

Strategies are overall plans for the cultivation of a prospect. You can have multiple strategies for each prospect. You use the Prospect Strategy component to create strategies.

You can link strategies to a prospect's spouse and to the prospect actions that you have created. For example, if your cultivation goal for Shawn Gallegher focuses on board member involvement and cultivation toward a major gift to a campaign, you can link the entire strategy to the record of Shawn's spouse. Also, if you create an action to invite Shawn Gallegher to an event that promotes the campaign, you can associate that action with his strategy.

This section discusses how to:

- Create an overall cultivation strategy for a prospect.
- View a summary of the strategies for a prospect.
- View additional information about a prospect's strategy.
- View the actions that are linked to a prospect's strategy.

Pages Used to Create Prospect Strategies

Page Name	Object Name	Navigation	Usage
Prospect Strategy	AV_PRSP_STRATEGY, AV_PRSP_STRATEGY_E, AV_PRSP_STRATEGY_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Use, Strategy, Prospect Strategy • Manage Contributor Relations, Manage Prospects, Use, Strategy-Org, Prospect Strategy • Manage Contributor Relations, Manage Prospects, Workset, Strategy, Prospect Strategy 	Create an overall cultivation strategy for a prospect.
Strategy Summary	AV_STRT_SMRY, AV_STRT_SMRY_E, AV_STRT_SMRY_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Inquire, Strategy Summary • Manage Contributor Relations, Manage Prospects, Inquire, Strategy Summary-Org • Manage Contributor Relations, Manage Prospects, Workset, Strategy Summary 	View a summary of the strategies for a prospect.
Prospect Strategy Detail	AV_PRSP_STRAT_SP	Click the Details link on the Strategy Summary page.	View additional information about a particular prospect strategy.
Linked Actions	AV_PRSP_STRAT_ACTN, AV_PRSP_STRAT_AC_E, AV_PRSP_STRAT_AC_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Use, Strategy, Linked Actions • Manage Contributor Relations, Manage Prospects, Use, Strategy-Org, Linked Actions • Manage Contributor Relations, Manage Prospects, Workset, Strategy, Linked Actions 	View the actions that are linked to a prospect's overall strategy.

Creating a Strategy

Access the Prospect Strategy page.

Prospect Strategy page

Overall Status

Select the status of cultivation in which the prospect is currently involved. Values include *Active*, *In Negotiation*, *Prospect*, *Suspect*, and *Ultimate Gift*. Values for this field are delivered with the system as translate values. You can modify these translate values.

Strategy Name

Enter a descriptive title for the strategy that you are creating.

Spouse Link

Click to link the strategy to the prospect's spouse. When you link a strategy to a spouse's record, any updates that you make to the strategy on one prospect's record are automatically updated on the linked record.

If you clear this check box, the strategy is no longer linked to the spouse's record. Clearing the check box creates a disconnect between the two spouse strategies. Changes on one record will no longer change the other.

Note. If a constituent does not have a spousal relationship in the system, this check box is unavailable for selection.

Strategy Status

Select the current state of progression for the strategy. Values for this field are delivered with the system as translate values. You can modify these translate values.

Add Action

Click to access the Actions component, where you can add actions that are related to the strategy that you have created.

Note. You must save the prospect's strategy before this button becomes active.

Description

Describe the strategy.

Initiative Type Select the type of initiative to relate to the prospect strategy. This selection narrows the choices that appear when you select an initiative.

Initiative Select an initiative to relate to the prospect strategy. When you select an initiative, its descriptive name appears to the right of this field.

See Also

Chapter 14, “Managing Prospects,” Creating Individual Prospect Actions, page 231

Viewing Actions Linked to a Strategy

Access the Linked Actions page.

Prospect Strategy Linked Actions

Gallegher, Shawn ID: AV0001 [Comments](#)

Constituent Type: Alumni Yr: 2001 Institution: PSUNV

Strategy View All First 1 of 1 Last

Strategy Name: Gallegher Strategy Strategy Status: + -

[Add Action](#)

Linked Actions View All First 1 of 1 Last

Plan Dt	Cmpl Dt	Action	*Status
07/24/1998		Invitation to alumni event	Pending Details

Spouse Linked Actions View All First 1 of 1 Last

*Plan Dt	Cmpl Dt	Action	*Status
			Details

Linked Actions page

Both the actions for the prospect and the actions of the prospect's spouse appear on this page when the action is linked to the strategy.

The fields on this page also appear on the Prospect Action page.

Add Action Click to open the Prospect Actions page, where you can add additional actions related to the strategy.

Details Click to view more information about a specific prospect action on the Action Detail page.

See Also

Chapter 14, “Managing Prospects,” Creating Individual Prospect Actions, page 231

Viewing a Strategy Summary

The fields on this page can also be found on the Prospect Strategy page.

See Also

[Chapter 14, “Managing Prospects,” Creating a Strategy, page 212](#)

Viewing Prospect Strategy Details

The fields on this page can also be found on the Prospect Strategy page.

See Also

[Chapter 14, “Managing Prospects,” Creating a Strategy, page 212](#)

Tracking Prospect Data

You can maintain information about a prospect’s ratings, personal assets, and philanthropic interests. In addition, you can generate bio bit and bio brief reports that summarize information about a prospect.

This section discusses how to:

- Prepare more detailed descriptions about a prospect’s involvement with the institution.
- Track information about a prospect’s assets.
- View information about a prospect’s assets.
- Track information about prospect ratings.
- View rating information for a prospect.
- View information about a prospect’s philanthropic interests.
- Prepare and generate biographic profile reports.

Common Element Used in This Section



Click to access the Display in Other Currency page, where you can view the amount in another currency and obtain exchange rate information.

Pages Used to Track Prospect Information

Page Name	Object Name	Navigation	Usage
Narrative	AV_BIO_BIT_RPT2, AV_BIO_BIT_RPT2_E, AV_BIO_BIT_RPT2_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Report, Biographic Profile, Narrative • Manage Contributor Relations, Manage Prospects, Report, Biographic Profile -Org, Narrative • Manage Contributor Relations, Manage Prospects, Report, Biographic Profile -Workset, Narrative 	Write a longer description about a prospect's involvement with the institution for a biographic brief report.
Personal Assets	AV_PRSN_ASSET, AV_PRSN_ASSET_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Use, Personal Assets • Manage Contributor Relations, Manage Prospects, Workset, Personal Assets 	Track information about the assets, such as securities, real estate, fine art, automobiles, heirlooms, and so on, that are owned by a prospect. The organizational records that are contained in a workset do not appear on this page because personal asset information pertains only to people.
Display In Other Currency	AV_CURRENCY_OTHER	<ul style="list-style-type: none"> • You can access the Display in Other Currency page through multiple navigation paths. Below is the most frequently used path. • Click the Display in Other Currency button on the Personal Assets page. 	View information about the exchange of a monetary value from one currency to another.
Personal Asset Summary	AV_PASSET_GRID, AV_PASSET_GRID_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Inquire, Personal Asset Summary • Manage Contributor Relations, Manage Prospects, Workset, Personal Asset Summary 	View information about the assets, such as securities, real estate, fine art, automobiles, heirlooms, and so on, that are owned by a prospect.
Personal Asset Detail	AV_PRSN_ASSET_SP	Click the Detail link on the Personal Asset Summary page.	View information about a particular asset that is owned by a prospect.

Page Name	Object Name	Navigation	Usage
Ratings	AV_PRSN_RATING, AV_PRSN_RATING_E, AV_PRSN_RATING_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Use, Ratings • Manage Contributor Relations, Manage Prospects, Use, Ratings-Org • Manage Contributor Relations, Manage Prospects, Workset, Ratings 	Track information about the ratings that your institution uses to qualify prospects.
Ratings Summary	AV_PRSN_RATE_SMRY, AV_PRSN_RATE_SMRY_E, AV_PRSN_RATE_SMRY_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Inquire, Rating Summary • Manage Contributor Relations, Manage Prospects, Inquire, Rating Summary -Org • Manage Contributor Relations, Manage Prospects, Workset, Rating Summary 	View information about the various ratings, such as household income, gift capacity, and so on, for a prospect.
Ratings Detail	AV_PRSN_RATE_SP	Click the Details link on the Ratings Summary page.	Display detailed information about a particular rating.
Philanthropic Interests	AV_PHIL_PNL, AV_PHIL_E_PNL, AV_PHIL_E_PNL	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Inquire, Philanthropic Interests • Manage Contributor Relations, Manage Prospects, Inquire, Philanthropic Interests-Org • Manage Contributor Relations, Manage Prospects, Workset, Philanthropic Interests 	View information about a prospect's charitable interests.

Page Name	Object Name	Navigation	Usage
Biographic Profile	AV_BIO_BIT_RPT, AV_BIO_BIT_RPT_E, AV_BIO_BIT_RPT_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Report, Biographic Profile, Biographic Profile • Manage Contributor Relations, Manage Prospects, Report, Biographic Profile-Org, Biographic Profile • Manage Contributor Relations, Manage Prospects, Report, Biographic Profile-Workset, Biographic Profile 	Prepare and generate biographic reports. You can generate standard reports or a customized report.

Creating a Biographic Narrative

Access the Narrative page.

Biographic Profile **Narrative**

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) **Run**

Gallegher, Shawn **ID:** AV0001 [Comments](#)
Constituent Type: Alumni **Yr:** 2001 **Institution:** PSUNV

Narrative

User ID: PS **Last Modification Date:** 01/04/2001

Narrative page

If you are preparing a biographic profile, enter a narrative about the constituent. The narrative field should contain more descriptive information than might be in the summary area on the Biographic Profile page. This field might be used by a president to detail a personal ask, or to provide a more detailed history of the constituent.

The information that you enter in this field appears on all bio brief reports for all users that choose to include narrative information in the bio bit, bio brief, or custom reports.

The Bio Bit and Bio Brief reports include information about the prospect based on the criteria that are set up for the report.

See Also

[Chapter 14, “Managing Prospects,” Creating a Biographic Profile, page 222](#)

Maintaining Personal Assets

Access the Personal Assets page. This page enables you to maintain specific asset information associated with a constituent.

Personal Assets

Gallegher, Shawn ID: AV0001 [Comments](#)
Constituent Type: Alumni **Yr:** 2001 **Institution:** PSUNV

Assets [View All](#) First 1 of 2 Last

Asset Category:	AUTO Automobile	+ -
*Description:	1998 Mercedes Benz	
Source Description:		
Comment:		

Asset Value [View All](#) First 1 of 1 Last

*Value Date	*Asset Value	Base Amount
07/24/1998	1,200.00	858.60 USD

Personal Assets page

Assets

Asset Category Select the type of asset that you are entering. Define asset categories using the Asset Types page.

Description Describe the asset.

Source Description Enter the name of the publication or person providing information about a prospect's asset to your institution.

Comment Enter notes about the asset.

Asset Value

Value Date Enter the date on which the asset value was determined. The default is today's date.

Asset Value

Enter the monetary value of the asset. You can add asset values as the monetary value of the asset changes over time. The most recent value for an asset appears on the Personal Asset Summary page.

Base Amount

If the currency for the asset is different from your institution's base currency, the value of the asset in base currency appears in this field.




Viewing Personal Assets

Access the Personal Asset Summary page.

Personal Asset Summary

Gallegher, Shawn

ID: AV0001

Constituent Type: Alumni

Yr: 2001

Institution: PSUNV

Assets

View All

First

1-2 of 2

Last

Asset Category	Description	Value Date	Value	Detail
1 AUTO	1998 Mercedes Benz	07/24/1998	32,197.50 USD	Detail
2 REALES	3 acre ranch	07/24/1998	1,500,000.00 USD	Detail

Personal Asset Summary page

The most recent monetary value for each asset that is owned by a prospect appears on this page.

Note. The organizational records that are contained in a workset do not appear on this page when accessed from a workset menu, because personal asset information pertains only to people.

See Also

Chapter 14, "Managing Prospects," Maintaining Personal Assets, page 219

Maintaining Ratings

Access the Ratings page.

Ratings

Gallegher, Shawn
ID: AV0001
[Comments](#)

Constituent Type: Alumni
Yr: 2001
Institution: PSUNV

Ratings
View All
First ◀ 1 of 1 ▶ Last

*Rating Category: HI Household Income + -

*Rating Type: STAFF Staff

Indicator: PERCNT Rank Percentile 98

*Rating Date: 07/24/1998 Potential Date: 01/01/1999

From Amount: USD

To Amount:

Source:

Comment:

Ratings page

Rating Category	Select the type of rating that you are entering. Rating categories are defined on the Rating Categories page.
Rating Type	Indicate the type of source that provided the rating information to your institution. Rating types are defined on the Rating Types page.
Indicator	Select a code that describes the actual rating classification for a particular rating category. Indicators are defined on the Rating Indicators page.
Rating Date	Enter the date on which rating information is provided. The default is today's date.
Potential Date	Enter the date on which a prospect may be qualified to give to your institution at a specified level.
From Amount and To Amount	Enter the minimum (from) and maximum (to) monetary ranges that specify a prospect's giving capacity or other rating that is measured in ranges of monetary amounts, like household income. A To Amount is not required.
Base Amount	The monetary values in the From Amount and To Amount fields appear here in base currency if you entered them in a currency other than your institution's base currency.
Source	Enter the name of the person, vendor, or publication providing rating information to your institution.
Comment	Enter notes about the rating.

Viewing Ratings

Access the Rating Summary page.

Rating Summary

Gallegher, Shawn
ID: AV0001
[Comments](#)

Constituent Type: Alumni
Yr: 2001
Institution: PSUNV

Ratings				
Rating Category	Rating Type	Rating Indicator	Rating Date	Details
1 Household Income	Staff	Rank Percentile 98	07/24/1998	Details

Rating Summary page

Details

Click to view more information about a specific rating. When you click this link, the Ratings Detail page displays the rating category, type, indicator, date, potential date, from and to amounts, source, and comments.

See Also

Chapter 14, “Managing Prospects,” Maintaining Ratings, page 220

Viewing a Prospect’s Philanthropic Interests

The Philanthropic Interests page gives a historical view of a constituent’s past philanthropy (whether or not it’s with your institution). It helps your institution to view patterns of philanthropy for this constituent in the past, to better target this person in future efforts.

Philanthropic interests are derived from the charitable involvement and institutional giving that are recorded for a prospect. Involvement records with a category of *Charitable* and a summary of all the gifts that are made by the prospect appear on this page.

See Also

Chapter 13, “Managing Constituent Data,” Adding Involvement Records, page 195

Creating a Biographic Profile

Access the Biographic Profile page.

Biographic Profile **Narrative**

Run Control ID: 1 [Report Manager](#) [Process Monitor](#) **Run**

Gallegher, Shawn ID: AV0001 [Comments](#)
 Constituent Type: Alumni Yr: 2001 Institution: PSUNV

Report Type
☒ Bio Bit
☐ Bio Brief
☐ Custom

Time Frame
☒ Current
☐ All

Summary

User ID: PS Last Modification Date: 01/04/2001

Biographic Profile page

Report Type

- Bio Bit** Select to generate a standard bio bit report defined by your institution.
- Bio Brief** Select to generate a standard bio brief report defined by your institution.
- Custom** Select to use one of the customized reports defined for your user ID on the Operator Defaults page.

Summary

If you are preparing a bio bit, enter a report summary. The information that you enter in this field appears on all printed bio bit reports for all users if they choose to include a summary in the report.

See Also

[Appendix A, "PeopleSoft Contributor Relations Reports," PeopleSoft Contributor Relations Reports: Selected Reports, page 575](#)

Implementing a Prospect Plan

Once you have created an overall strategy, determine the steps or actions that you plan to take toward completing the strategy. You can create multiple actions, such as dinners, phone calls, and solicitations, for a prospect.

There are two ways to create actions: you can create *mass actions*, where you create one action and assign it to multiple prospects, or you can create *individual actions*, where you create an action that is associated with only one prospect.

If you bestow a gift on a prospect, use the application to track the gift, its value, and the date that it was given.

Once a step in the cultivation process is complete, it is important to document the action taken and its result in a contact report, a written report that details an action and its result.

Because most of your staff members deal with actions for many prospects at one time, they need to keep track of all the actions they're handling. The system provides a personalized To Do List that displays a list of all the actions on which you are working.

This section discusses how to:

- Clear a prospect for cultivation.
- Define parameters to create mass actions.
- Define additional parameters to create mass actions.
- Create actions for individual prospects.
- Enter action information.
- Complete actions.
- Write a contact report.
- Maintain information about prospect gifts given throughout the cultivation process.
- View a list of gifts already given to a prospect.
- View additional information about a specific prospect gift.
- View clearances for a prospect.
- Select criteria to view a list of a prospect's actions.
- View existing actions for a prospect.
- View more detailed information about an existing action.
- View contact reports for a prospect.
- View more detailed information about a contact report.
- View actions for which a resource is responsible.

Pages Used to Implement a Prospect Plan

Page Name	Object Name	Navigation	Usage
Clearance	AV_CLEARANCE_P, AV_CLEARANCE_E	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Use, Clearance • Manage Contributor Relations, Manage Prospects, Use, Clearance-Org 	Approve a prospect for cultivation related to an initiative or prospect strategy.

Page Name	Object Name	Navigation	Usage
Mass Actions 1	AV_MASS_ACTN	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Use, Mass Actions, Mass Actions 1 • Manage Contributor Relations, Manage Prospects, Workset, Mass Actions, Mass Actions 1 	To create an action for multiple prospects at one time.
Mass Actions 2	AV_MASS_ACTN2	Manage Contributor Relations, Manage Prospects, Use, Mass Actions, Mass Actions 2	Assign constituents to a mass action.
Prospect Action	AV_CNST_ACTN, AV_CNST_ACTN_E	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Use, Actions, Prospect Action • Manage Contributor Relations, Manage Prospects, Use, Actions-Org, Prospect Action 	Begin the process of creating an action.
Action Info (action information)	AV_CNST_ACTN2, AV_CNST_ACTN2_E	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Use, Actions, Action Info • Manage Contributor Relations, Manage Prospects, Use, Actions-Org, Action Info 	Enter additional information about the action that you are creating.
Action Results	AV_CNST_ACTN3, AV_CNST_ACTN3_E	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Use, Actions, Action Results • Manage Contributor Relations, Manage Prospects, Use, Actions-Org, Action Results 	Complete an action and record its result.
Contact Report	AV_CNTC_RPT, AV_CNTC_RPT_E	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Use, Actions, Contact Report • Manage Contributor Relations, Manage Prospects, Use, Actions-Org, Contact Report 	Enter a contact report or a report detailing the results of a particular action.

Page Name	Object Name	Navigation	Usage
Donor Appreciation	AV_DONR_APPR, AV_DONR_APPR_E, AV_DONR_APPR_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Use, Donor Appreciation • Manage Contributor Relations, Manage Prospects, Use, Donor Appreciation-Org • Manage Contributor Relations, Manage Prospects, Workset, Donor Appreciation 	Maintain information about the gifts that you bestow on prospects throughout the cultivation process.
Donor Appreciation Summary	AV_DONR_APPR_INQ, AV_DONR_APPR_INQ_E, AV_DONR_APPR_INQ_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Inquire, Donor Appreciation Summary • Manage Contributor Relations, Manage Prospects, Inquire, Donor Appreciation Smry-Org • Manage Contributor Relations, Manage Prospects, Workset, Donor Appreciation Summary 	View a list of the items that have been given to a prospect as tokens of appreciation.
Donor Appreciation Detail	AV_DONR_APPR_SP	Click the Details link on the Donor Appreciation Summary page.	View additional information about a specific token of appreciation.
Clearance	AV_CLEARANCE_P_INQ, AV_CLEARANCE_E_INQ	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Inquire, Clearance • Manage Contributor Relations, Manage Prospects, Inquire, Clearance-Org 	View information about the clearances for a prospect. Determine whether clearance is required and examine a constituent's involvement to prevent staff from overloading the constituent with demands that take time and effort.
Action Filter	AV_ACTN_FLTR, AV_ACTN_FLTR_E, AV_ACTN_FLTR_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Inquire, Action Summary, Action Filter • Manage Contributor Relations, Manage Prospects, Inquire, Action Summary-Org, Action Filter • Manage Contributor Relations, Manage Prospects, Workset, Action Summary, Action Filter 	Narrow the list of a prospect's actions that appear on the Action Summary page.

Page Name	Object Name	Navigation	Usage
Action Summary	AV_ACTN_SMRY, AV_ACTN_SMRY_E, AV_ACTN_SMRY_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Inquire, Action Summary, Action Summary • Manage Contributor Relations, Manage Prospects, Inquire, Action Summary-Org, Action Summary • Manage Contributor Relations, Manage Prospects, Workset, Action Summary, Action Summary 	View lists of existing actions for a prospect.
Action Detail	AV_ACTN_DTL_SP, AV_ACTN_DTL2_SP, AV_ACTN_DTL3_SP	<ul style="list-style-type: none"> • You can access the Action Detail page through multiple navigation paths. Below is the most frequently used path. • Click the Detail link on the Action Summary page. 	View additional information about an existing action.
Ask Detail	AV_ACTN_ASK_SP	Click the Ask Information button on the Action Detail page.	View specifics about the ask.
Resource Assignment Detail	AV_ACTN_ASGN_SP	Click the Resource Assignments button on the Action Detail page.	View information about the resources assigned to this action.
Initiative Detail	AV_ACTN_INTV_SP	Click the Initiatives button on the Action Detail page.	View information about the initiatives linked to this action.
Contact Report Summary	AV_CNTC_RPT_SMRY, AV_CNTC_RPT_SMRY_E, AV_CNTC_RPT_SMRY_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Inquire, Contact Report Summary • Manage Contributor Relations, Manage Prospects, Inquire, Contact Report Summary-Org • Manage Contributor Relations, Manage Prospects, Workset, Contact Report Summary 	View lists of contact reports for a prospect. View contact reports for other prospects that link to this prospect.
Contact Report Detail	AV_CNTC_RPT_SP, AV_CNTC_RPT2_SP	Click the Contact Report button on the Contact Report Summary page.	View additional information about a specific contact report.

Page Name	Object Name	Navigation	Usage
To Do List – Staff, To Do List – Volunteer, To do List - Unit	AV_TODO_LIST, AV_TODO_LIST_UNT	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Inquire, To Do List-Staff or To Do List-Volunteer or To Do List-Unit • Manage Contributor Relations, Manage Campaigns, Inquire, To Do List-Staff or To Do List-Volunteer or To Do List-Unit • Manage Contributor Relations, Manage Volunteers, Inquire, To Do List-Staff or To Do List-Volunteer or To Do List-Unit • Manage Contributor Relations, Manage Events, Inquire, To Do List-Staff or To Do List-Volunteer or To Do List-Unit • Manage Contributor Relations, Manage Membership, Inquire, To Do List-Staff or To Do List-Volunteer or To Do List-Unit • Manage Contributor Relations, Manage Other Initiatives, Inquire, To Do List-Staff or To Do List-Volunteer or To Do List-Unit 	View lists of the actions for which a resource is responsible during a particular time frame or for a particular initiative prospect.




Clearing a Prospect

Access the Clearance page.

Clearance

Gallegher, Shawn
Constituent Type: Alumni

ID: AV0001
Yr: 2001




Institution: PSUNV

☐ **Clearance Required**

Prospect Manager: Capozzelli, Mario

Clearances

View All First 1 of 1 Last

Intv Type	Initiative	
CAMPAIGN	ATHLETICS	Athletic Facilities Campaign
Course of Action:	Ask for donation.	
Strategy:	2	Gallegher Strategy
	Start Date:	01/01/2001
	End Date:	02/01/2001

Clearance page

Clearance Required

Select to indicate that the constituent must be cleared before he or she can be selected as a volunteer or prospect for any initiative.

Prospect Manager

Displays the name of the person who is responsible for managing the institution contacts with this major prospect. Contact this person if clearance is required.

Intv Type (initiative type)

If clearance is approved, enter the initiative type for which clearance is requested. Initiative types are *Campaign*, *Volunteer*, *Membership*, *Event*, and *Other*.

Initiative

Enter the initiative for which clearance is approved. This field displays the initiatives that match the initiative type that you selected.

Course of Action

Enter a description (up to 30 characters) of the course of action that you plan to take with the constituent.

Strategy

If the clearance is related to a prospect strategy, select the appropriate strategy from the list of strategies that exists for the constituent.

Defining Mass Action Parameters

Access the Mass Actions 1 page.

Mass Actions 1 | **Mass Actions 2**

*Institution: PSUNV PeopleSoft University

*Action: Invitation to banquet

*Action Type: INVIT Invitation

*Ask From: USD Ask To:

*Status: Scheduled *Plan Dt: 11/10/2000

Solicitor:

Resp Person: Staff 8664 Carroll, Bruce

Others Assigned		View All	First	1 of 1	Last
Assignment Type	Resource Assigned				
Staff	AV0024 Perkins, Darla				

Mass Actions 1 page

To associate a group of prospects with one action, such as a fundraising dinner or other event, the Mass Actions 1 and 2 pages provide a one-stop process for setting up the action.

Institution

Enter an institution.

Note. If your security access limits you to one academic institution, this field does not appear.

Action

Enter a descriptive title (up to 100 characters) for the action.

Action Type

Select a classification for the action. Action types are defined on the Action Types page.

Ask From and Ask To

If the action type that you selected is *Ask*, you are required to enter an Ask From amount.

Status

Select the overall state of an action at a particular time. Action status codes are defined on the Action Status page.

Plan Dt (planned date)

Enter the date when the action is planned to take place. The default is today's date.

Solicitor

If the action type you selected is *Ask*, you must select the type of resource that carries out the task; then select the solicitor's ID. Options include all the resources that are assigned the role of solicitor.

Resp Person (responsible person)

Select the type of resource and ID of the person who is overseeing the action. The values for ID types are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Assignment Type

Select the resource type, *Staff*, *Unit*, or *Volunteer*; that is being assigned to the action. The values in this field are delivered with the system as

translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

The resource type you select determines the list of available options in the Resource Assigned field below.

Resource Assigned

Enter the ID number of the resource that is assigned to carry out an assignment. When you select an ID or unit code, the person or unit's name appears to the right of this field.

Defining Additional Mass Action Parameters

Access the Mass Actions 2 page.

Mass Actions 1 Mass Actions 2

Institution: PSUNV PeopleSoft University

Action: Invitation to banquet

Linked Constituents View All First 1-2 of 2 Last

ID Type	ID	Name
Person	AV0001	Gallegher, Shawn
Org	AV1000	Ford Motor Company














Mass Actions 2 page

ID Type and ID

Select the ID type and ID of each prospect to associate with the action. When you select an ID, the prospect's name appears to the right. The values in the ID Type field are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Creating Individual Prospect Actions

Access the Prospect Action page.

Prospect Action		Action Info	Action Results	Contact Report
Johnson, Shaqua		ID: AV0020	  	
Constituent Type: Alumni		Yr: 1977	Institution: PSUNV	
Action Nbr:	63			
Action:	Invite to Dean's Symposium			
Planned Date:	11/20/1998 	Action Type:	Invitation 	
Expiration Date:		Contact Type:	Letter 	
Complete Date:	07/24/2001 	*Status:	Complete 	
Strategy:	3 	Johnson Business Endowment		
Description:				
Resp Person:	Staff 	10001 	Chavez, John Joseph	
Prospect Mgr:	Franken, Alan			

Prospect Action page

Actions are the individual contacts that you have with a prospect throughout the cultivation process.

Action	Enter a description (up to 100 characters) of the action.
Planned Date	Enter the date on which the action is scheduled to take place. The default is today's date.
Expiration Date	Enter the date on which the action is no longer valid, regardless of whether it is complete. If the expiration date has passed, the action does not appear in the current view of the To Do list.
Complete Date	<p>If the action is complete, enter the completion date or the date on which the action occurred. Setting an action to <i>Complete</i> requires that you enter an action result code before the action can be saved.</p> <p>If the Require Contact Report check box is selected on the CR Installation page, once an action is complete you are required to enter information on the Contact Report page.</p>
Strategy	Select a prospect strategy to associate with the action. Selecting a strategy ties this action to a particular prospect strategy.
Description	Enter descriptive information (up to 254 characters) about the purpose and goal of the action.
Action Type	Select the classification, such as <i>Ask</i> , <i>Dinner</i> , or <i>Phone Call</i> , for the action. Action types are defined on the Action Types page.
Contact Type	Select the value that determines how the action is made; for example, by <i>Telephone Call</i> , <i>Letter</i> , <i>Email</i> , or <i>Personal Visit</i> . Contact types are defined on the Action Contact Type page.

- Status** Select the overall state, such as *Scheduled*, *In Process*, or *Complete*, of an action at a particular time. Status values are defined on the Action Status page.
- Responsible Person** Select the type of resource that carries out the task, then enter the ID of the person who is overseeing the action. When you select an ID, the person's name appears to the right of this field.

See Also

Chapter 14, “Managing Prospects,” Creating Prospect Strategies, page 211

Chapter 14, “Managing Prospects,” Implementing a Prospect Plan, page 223

Entering Action Information

Access the Action Info page.

The screenshot shows the 'Action Info' page in a web application. At the top, there are four tabs: 'Prospect Action', 'Action Info' (selected), 'Action Results', and 'Contact Report'. Below the tabs, the following information is displayed:

- Johnson, Shaqua** (Name)
- ID:** AV0020
- Yr:** 1977
- Institution:** PSUNV
- Action:** Invite to Dean's Symposium
- Action Type:** Invitation

Below this information, there are two rows of input fields:

- Ask From:** [input field] **USD** **Ask To:** [input field]
- Type:** [dropdown menu] **Solicitor:** [input field]

There are two sections below the input fields:

- Initiatives:** A table with columns 'Initiative Type' and 'Initiative Code'. It shows 'CAMPAIGN' and 'BUSINESS' with a search icon. Below the table is 'College of Business Campaign' with '+' and '-' buttons. Navigation links: View All, First, 1 of 1, Last.
- Others Assigned:** A table with columns 'Type', 'Resource Assigned', and 'Role'. It shows 'Unit' (dropdown), 'ANNLGVG' (with search icon), 'Annual Giving', 'SOL' (with search icon), and 'Solicitor'. Below the table are '+' and '-' buttons. Navigation links: View All, First, 1 of 2, Last.

Action Info page

Actions are the individual contacts that you have with a prospect throughout the cultivation process.

- Ask From and Ask To** If the action type that you selected on the Prospect Action page is *Ask*, enter an ask amount range in these fields. The currency for these fields appears in the default currency for the institution. If the ask amount is not a range, enter only the ask from amount.

- Solicitor** If the action type that you selected on the Prospect Action page is *Ask*, you must select the type of resource that carries out the task, then enter the solicitor's ID. Values include the resources that are assigned to the role of solicitor.

Initiatives

Initiative Type and Initiative Code

Enter the type of initiative and initiative code to relate to the action.

Others Assigned

If you assign a staff resource in this area, the system adds the action to the staff member's to do list.

Type and Resource Assigned

Select the type of resource that is assigned to the action and enter the ID of the resource assigned.

The values for resource types are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Role

Select the role or capacity of the resource that is assigned to the prospect for this action.

Completing Actions

Access the Actions Results page.

Prospect Action		Action Info		Action Results		Contact Report	
Johnson, Shaqua		ID: AV0020					
Constituent Type: Alumni		Yr: 1977		Institution: PSUNV			
Action: Invite to Dean's Symposium		Action Type: Invitation					
Result Code: <input type="text" value="Gift"/>		Complete Date: 07/24/2001					
Expected Commitment: <input type="text" value="0.00"/> USD		Actual Commitment: 5,000.00					
Pledge Nbr	Date	Pledge Amt					
<input type="text" value="214"/>	07/24/2001	2,000.00 USD		Details			
Action Gifts View All First 1 of 1 Last							
*Gift Nbr	Gift Date	Gift Amt					
<input type="text" value="210"/>	07/24/2001	3,000.00 USD		Details + -			

Action Results page

Before you can access the fields on this page, you must change the action's status to *Complete* on the Prospect Action page.

Result Code

You must select the result of the action, such as *Gift*, *Pledge*, *Ask Again*, *Accepted*, and *Negotiate*. These codes are defined on the Action Results page.

	Note. This field is required for a <i>Complete</i> action.
Expected Commitment	If the ask resulted in a commitment, enter the monetary amount that you expect to receive from the donor because of this action, if known.
Actual Commitment	Displays the sum of gifts and pledges resulting from this action. If a gift is a pledge payment toward a pledge that is associated with the ask, it is not included in this total, because that would be counting it twice.
Pledge Nbr (pledge number)	If the action that you are completing resulted in a pledge, enter the pledge number that is associated with the pledge that the prospect has made. If you enter a pledge number, the amount that is associated with the commitment appears in the Commitment Amount field. This amount is derived from the gift entry component in the system.
	Important! You can retrieve information about the pledges that were made and recorded in the past 60 days.
Gift Nbr (gift number)	Enter the gift number for any gifts the prospect made that are associated with the action.
	Important! The Gift Amount field displays the entire amount of the gift, regardless of any recognition or soft credit allocations. In the Gift Nbr field, you can retrieve information about all gifts that have been given and recorded in the past 60 days.
Detail	If you selected a pledge, click to view detailed information about the pledge on the Pledge Detail page. If you selected a gift, click to view detailed information about the gift on the Gift Detail page.

See Also

[Chapter 22, “Entering Commitments,” Viewing Pledge Details, page 418](#)

[Chapter 22, “Entering Commitments,” Viewing Gift Details, page 399](#)

Writing a Contact Report

Access the Contact Report page.

Prospect Action Action Info Action Results **Contact Report**

Johnson, Shaqua **ID:** AV0020 **Institution:** PSUNV
Constituent Type: Alumni **Yr:** 1977

Action: Invite to Dean's Symposium **Action Type:** Invitation

Author ID: 8664 Carroll, Bruce
Report Date: 07/24/2001 **Complete Date:** 07/24/2001

Report: Contacted constituent.

Link Report View All First 1 of 1 Last

*ID Type	*ID	Name

+ - **Link**

Contact Report page

- Author ID** Enter the name of the contact report author. This field populates by default to your user ID.
- Report Date** Enter the date on which the contact report is created. This field populates by default to today's date.
- Report** Describe the outcome of the action, including any biographic or demographic changes that you have learned about the action. This is a free-text field, and is required.
- ID Type** Select ID types of any additional prospects to link to this contact report.
- ID** Enter the IDs of any additional prospects to link to this contact report. Once a contact report is linked to a prospect, it appears in the Linked Reports group box on the Contact Report Summary page for that prospect.
- Link** Click this button to link the contact report to the prospect's spouse. The system adds a record in the Link Report group box with the spouse's ID.

Technical Information

If your institution requires a contact report, and has selected the Require Contact Report check box on the CR Installation page, then you cannot save a completed action without at least beginning a contact report.

See Also

[Chapter 14, "Managing Prospects," Implementing a Prospect Plan, page 223](#)

[Chapter 14, "Managing Prospects," Viewing Contact Reports, page 243](#)

Maintaining Donor Appreciation Items

Access the Donor Appreciation page.

Donor Appreciation

Gallegher, Shawn ID: AV0001 [Comments](#)

Constituent Type: Alumni Yr: 2001 Institution: PSUNV

View All First 1 of 7 Last

Appreciation Item Detail

*Business Unit: PSUNV PSUNV main BU

*Item: AERO1 Aerial Photo of Campus

Value: 6.66 USD

*Date Given: 10/04/2000

Given By

Type: Unit

Resource: ANNLGVG Annual Giving

Comments:

Donor Appreciation page

Business Unit

Enter the business unit bestowing the item that you are giving the donor. The items that are associated with the setID for the business unit that you select appear in the Item field.

Item

Describe the item that you're giving to the prospect. Appreciation items are defined on the Appreciation Items page. Donor appreciation gifts might include items such as pens, artwork, and books.

Date Given

Enter the date on which you gave the appreciation item. The default is today's date.

Type

Select the type of resource, *Staff*, *Volunteer*, or *Unit*, that is giving the gift.

The values in this field are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

The resource type you select determines the list of choices available in the Resource field below.

Resource

Enter the ID of the resource that is giving the gift.

Comments

Enter any descriptive text about the token of appreciation or the reason for giving it.

Viewing a List of Appreciation Items Given

Access the Donor Appreciation Summary page.

Donor Appreciation Summary

Gallagher, Shawn
ID: AV0001
[Comments](#)

Constituent Type: Alumni
Yr: 2001
Institution: PSUNV

Donor Appreciation					View All	First	1-7 of 7	Last
Business Unit	Item	Date	Given By	Details				
1 PSUNV	Aerial Photo of Campus	10/04/2000	Annual Giving	Details				
2 PSUNV	University Clock	10/04/2000	Annual Giving	Details				
3 PSUNV	Crystal Clock	10/04/2000	Annual Giving	Details				
4 PSUNV	Gold Pen	10/04/2000	Annual Giving	Details				
5 PSUNV	Member Pencil	10/04/2000	Career Services	Details				
6 PSUNV	Season Football Tickets	10/04/2000	Career Services	Details				
7 PSUNV	University Coffee Mug	09/26/2000	Alumni Reunions Team	Details				

Donor Appreciation Summary page

See Also

[Chapter 14, “Managing Prospects,” Maintaining Donor Appreciation Items, page 237](#)

Viewing Donor Appreciation Details

Access the Donor Appreciation Detail page.

Donor Appreciation Detail

ID:	AV0001	Gallegher,Shawn
Institution:	PSUNV	PeopleSoft University
Business Unit:	PSUNV	PSUNV main BU
Item:	AER01	Aerial Photo of Campus
Value:		6.66 USD
Date Given:	10/04/2000	

Given By

Type:	Unit	
Resource:	ANNLGVG	Annual Giving

Comments

Return

Donor Appreciation Detail page




See Also

[Chapter 14, “Managing Prospects,” Maintaining Donor Appreciation Items, page 237](#)

Viewing Clearances

Access the Clearance inquiry page.

Clearance

Gallegher,Shawn
ID: AV0001




Constituent Type: Alumni
Yr: 2001
Institution: PSUNV

☐ Clearance Required:
Prospect Manager: Capozzelli,Mario

View All First 1 of 1 Last

Intv Type	Initiative	
CAMPAIGN	ATHLETICS	Athletic Facilities Campaign
Course of Action:	Ask for donation.	Start Date: 01/01/2001
Strategy:	2 Gallegher Strategy	End Date: 02/01/2001

Clearance page

See Also

[Chapter 14, “Managing Prospects,” Clearing a Prospect, page 228](#)

Filtering Actions

Access the Action Filter page.

Action Summary

Action Filter

Gallegher, Shawn
ID: AV0001
[Comments](#)

Constituent Type: Alumni
Yr: 2001
Institution: PSUNV

Action Type Code: INVIT Invitation

Action Status: CMP Complete

Responsible Person:

Solicitor:

Item	From	To
Ask Amount:	<input type="text"/> USD	<input type="text"/>
Commitment Amount:	<input type="text"/>	<input type="text"/>
Planned Date:	<input type="text"/> <input type="button" value="31"/>	<input type="text"/> <input type="button" value="31"/>
Complete Date:	<input type="text"/> <input type="button" value="31"/>	<input type="text"/> <input type="button" value="31"/>

Action Filter page

You can select values from any of the fields on this page to narrow the number of actions that you view. Only actions meeting the criteria that you select appear on the Action Summary page. Selection of multiple criteria implies an “AND,” requiring the action to meet all criteria to be selected.

Action Type Code Enter an action type code. The action type is a classification for the action. Values are items such as *Ask*, *Invitation*, and *Phone Call*.

Action Status Enter an action status. Action status is the overall state of an action, *Scheduled*, *In Process*, or *Complete*, at a particular time.

Responsible Person Enter the person who is overseeing the action to see only actions involving this resource.

Solicitor Select a solicitor type and enter a solicitor ID to see actions for a particular solicitor. The solicitor type indicates whether the resource is a staff member, a unit, or a volunteer. The solicitor is the resource who makes the actual ask to the prospect.

Important! Solicitors apply only to actions with the type *Ask*. If you select a solicitor, the Action Type Code field changes to *Ask*.

From, To, and Ask Amount Enter a range for the ask amount. The From field contains the lowest amount in the range of actions to view; and the To field contains the highest amount. Ask amounts apply only to actions with the type *Ask*. If you enter an ask amount range, the Action Type Code field value changes to *Ask*.

From, To, and Commitment Amount Enter a range for the commitment amount. The from field contains the lowest amount in the range of actions to view, and the to field contains

the highest amount. Commitment amounts apply only to actions that have the type *Ask*. If you enter a commitment amount range, the Action Type Code field value changes to *Ask*.

This filter value returns only actions that have commitment information on the Results page and that fall into the range that you entered.

Planned Date

Enter a planned from and to date range. The planned date is the date on which the action is tentatively scheduled to occur.

Complete Date

Enter a complete from and to date range. The complete date is the date on which the action is actually complete.

Search

Click to retrieve a list of the actions matching the criteria that you selected. The Action Summary page displays the list of actions meeting your criteria.

Viewing Existing Actions

Access the Action Summary page.

The screenshot displays the 'Action Summary' page. At the top, there are tabs for 'Action Summary' and 'Action Filter'. Below the tabs, the following information is shown:

- Name: Gallagher, Shawn
- ID: AV0001
- Constituent Type: [Alumni](#)
- Year: 2001
- Institution: PSUNV
- Prospect Manager: Capozzelli, Mario

Below this information is a table titled 'Actions'. The table has columns for 'Planned Date', 'Complete Date', 'Action', 'Status', and 'Detail'. There is one row of data:

Planned Date	Complete Date	Action	Status	Detail
1 07/24/1998		Invitation to alumni event	Pending	Detail

Navigation links at the top right of the table include 'View All', 'First', '1 of 1', and 'Last'.

Action Summary page

The fields on this page also appear on the Prospect Action page.

Contact Report

Click this link to view contact report information that is associated with this action on the Contact Report Detail page.

See Also

[Chapter 14, "Managing Prospects," Creating Individual Prospect Actions, page 231](#)

Viewing Action Details

Access the Action Detail page.

Action Detail

Action Number:	3		
Action:	Invitation to alumni event		
Action Type:	Invitation		
*Action Status:	Pending		
Planned Date:	07/24/1998		
Strategy:	Gallegher Strategy		
Responsible Person:	AV0022	Capozzelli, Mario	
Complete Date:			
Result:			

Edit Action
Ask Information
Resource Assignments
Initiatives

Action Detail page

The fields on this page also appear on the Prospect Actions and Action Results pages.

- | | |
|-----------------------------|--|
| Edit Action | Click to edit the action. The Prospect Action page appears in Update mode. |
| Ask Information | If the action that you are viewing is an <i>Ask</i> action type, click to view specifics about the ask on the Ask Info page. |
| Resource Assignments | Click to view information about the resources that are assigned to this action. The Resource Assignment Detail page appears. |
| Initiatives | Click to view information about the initiatives that are linked to this action. The Initiative Detail Page appears. |

See Also

[Chapter 14, “Managing Prospects,” Entering Action Information, page 233](#)

[Chapter 14, “Managing Prospects,” Completing Actions, page 234](#)

Viewing Contact Reports

Access the Contact Report Summary page.

Contact Report Summary

Gallegher, Shawn
ID: AV0001
[Comments](#)

Constituent Type: Alumni
Yr: 2001
Institution: PSUNV

Constituent Contact Reports			View All	First	1 of 1	Last
Rpt Dt	Cmpl Dt	Action Description				
01/08/2001	01/08/2001	Invitation to alumni event	Details			

Linked Contact Reports			View All	First	1 of 1	Last
Rpt Dt	Author	Name				

Contact Report Summary page

Constituent Contact Reports

Details

Click to view detailed information about a specific contact report on the Contact Report Detail page.

Linked Contact Reports

This section of the page includes contact reports that contain further information about the prospect.

See Also

Chapter 14, "Managing Prospects," Writing a Contact Report, page 235

Viewing Contact Report Details

The ID and name of other prospects to whom this contact report pertains and who were linked to the contact report for the original prospect appear in the Link Report group box.

See Also

Chapter 14, "Managing Prospects," Writing a Contact Report, page 235

Viewing Your To Do List

Access the To Do List - Staff page.

To Do List - Staff

Institution: PeopleSoft University

Resource Assigned: Chavez, John Joseph

Designee Type:

***Time Frame:** [Refresh...](#)

To Do List Entry								View All	First	1-2 of 2	Last
Designee	Action	Action Type	Planned Date	Complete Date	Action Status	Result	Details				
1 Johnson, Shaqua	Invite to Dean's Symposium	Invitation	11/20/1998		Scheduled		Details				
2 Homecoming 1999	Call printer about invitation design	Hire contractor	01/01/1999		Scheduled		Details				

To Do List – Staff page

The actions that appear on this page are either manually generated as prospect or initiative actions or generated by running the Build Actions process when defining a public relations plan for an initiative.

Institution

Enter the institution.

Note. If your security access limits you to one academic institution, this field does not appear.

Resource Assigned

Enter the resource for which to view actions.

Designee Type

Select a designee type, the category of constituents or initiatives that is affected by the action. Values are *Constituents Only*, *Initiatives Only*, and *All*.

The values for this field are delivered with the system as translate values. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Refresh

Click to retrieve a new list of actions meeting the criteria that you selected earlier on this page.

CHAPTER 15

Managing Planned Giving Prospects

This chapter provides an overview of managing planned giving prospects, lists common elements, and discusses how to:

- Track bequests.
- Track trusts.
- Track gift annuities.
- Track pooled income funds.
- Work with a planned giving profile.

See Also

Chapter 5, “Setting Up Prospects,” page 55

Understanding Planned Giving Prospect Management

To effectively manage prospects, you must quickly evaluate constituents, create comprehensive cultivation-activity plans, and constantly monitor and revise those plans. PeopleSoft Contributor Relations enables you to do this by maintaining extensive prospect information and providing tools that you can use to effectively implement and manage cultivation plans.

Planned giving prospect management involves tracking planned giving prospects, or prospective donors, from the point of discovery through elevation to prospect, cultivation, and, subsequently to becoming a donor of one or more planned gifts to your institution.

For planned gifts, the information that you track is different from the information for standard gifts that are entered through gift and pledge sessions. With planned giving, you track basic gift information and translate present and future values for reporting and estimating the effect that today's gift will have on your institution when the gift matures.

You can enter data that is related to a particular planned gift, but no processing to your institution's financial system or interaction with external planned giving applications is supported.

Common Elements Used in This Chapter

For	Describe how the planned gift is to be distributed.
------------	---

Business Unit	<p>Select the business unit to which the planned gift is allocated. The Designation field displays the values that you defined for the setID that is associated with this business unit.</p> <p>If you have already selected a designation, then change the business unit, and your selections are backed out.</p>
Designation	Select the designation to assign. Designations are funds at your institution to which donations can be allocated.
Type	<p>Select a type for the intended distribution. Values are:</p> <p><i>Interim:</i> The designation is a temporary holding site for the planned gift.</p> <p><i>Ultimate:</i> The gift remains in the designation that you select.</p> <p>Values for this field are delivered with the system as translate values. You can modify these translate values.</p>
Amount	Enter the amount to be distributed to the designation that you select.
ID and Name	Enter either an ID or a name. If you enter an ID, the Name field becomes display-only. If you enter a name, you cannot enter an ID.
Alliance	<p>Select the value that describes the contact's connection to the planned gift.</p> <p>Values for this field are delivered with the system as translate values. You can modify these translate values.</p>
Address	If the external contact does not have an ID in the system, click this link to enter address information on the Address Detail page for the external contact.
Staff ID	Select the staff ID of each staff member who is associated with the planned gift.
Role	Select the role of the assigned staff. Roles are determined by your institution and include values such as <i>Prospect Manager</i> , <i>Solicitor</i> , and <i>Campaign Manager</i> .
Inst Est Value (institution estimated value)	Enter the expected value to your institution of the planned gift.
Inst Actual Value	Enter the amount received by your institution.
Irrevocable	Select if the planned gift agreement cannot be revoked.
Campaign	Select the campaign associated with the planned gift. Campaigns are established by your institution. A campaign is an organized institutional effort that is targeted to a specific constituency that occurs over a specified period with specific purposes and goals.
Comments	Enter any additional comments about the planned gift.
Date of Birth and SSN (Social Security Number)	If you entered an ID, the person's date of birth and social security number appear, if they exist in the system. If you entered a name, you can enter this additional information. The Date of Birth field accepts both partial and complete dates. The system does not format this date field, so enter the date as it should appear.

Estimated Value	Enter the estimated value of the beneficiary's portion of the donor's planned gift.
Actual Value	Enter the beneficiary's or institution's payout.
Address	If the beneficiary does not have an ID in the system, click this link to enter address information for the beneficiary.
Item Type	Select an item type for each associated account at your institution. Item types are defined by your institution. The values from which you can select include the item types that are associated with your institution's default setID.
Type	Select the type of account that is being used to manage the trust. Values are <i>Asset</i> , <i>Liability</i> , and <i>Reserve</i> . Values for this field are delivered with the system as translate values. You can modify these translate values.
Details	Click the link on any line to view more detailed information.

Tracking Bequests

You can track:

- Information that is related to bequests that are made to benefit your institution, including original bequests and those that are made or amended in a codicil.
- Designations at your institution that benefit from the bequest.
- Estimated value, actual value, and maturity date of the bequest.
- External contacts and staff members at your institution who handle the bequest.

This section discusses how to:

- Enter bequest details.
- Enter additional information about that bequest.
- Enter information about how the bequest will be handled by your institution.

Pages Used to Track Bequests

Page Name	Object Name	Navigation	Usage
Bequest Detail	AV_BEQUEST_DTL	Manage Contributor Relations, Manage Prospects, Use, Bequests, Bequest Detail	Enter information about a constituent's bequest to your institution.
Bequest Detail 2	AV_BEQUEST_DTL2	Manage Contributor Relations, Manage Prospects, Use, Bequests, Bequest Detail 2	Enter additional information about a constituent's bequest to your institution.
Bequest Information	AV_BEQUEST_INFO	Manage Contributor Relations, Manage Prospects, Use, Bequests, Bequest Information	Enter information about the distribution, external contacts, and assigned staff of the planned gifts to your institution.

Defining Bequest Details

Access the Bequest Detail page.

Bequest Detail
Bequest Detail 2
Bequest Information

Gallegher, Shawn
ID: AV0001
[Comments](#)

Constituent Type: Alumni
Yr: 2001
Institution: PSUNV

*Bequest Date: 06/19/1998
*Bequest Status: Advised - Verbal

Est Maturity: 06/02/2048
Status Dt:

Est Estate: 5,000,000.00 USD
Act Maturity:

Present Value: 2,500,000.00
Act Estate:

Campaign: CAMP2000 Campaign 2000

Benefit to Institution

Estimated Value: 2,000,000.00 Pct: Actual Value:

Other Beneficiaries
View All First 1-2 of 2 Last

Beneficiary	Name	Estimated Value	Pct	Actual Value
AV0004	Holmgren, June	2,000,000.00 USD		
AV0024	Perkins, Darla	1,000,000.00 USD		

Bequest Detail page

Bequest Date	Enter the date that the bequest was made or that your institution learned of the bequest. The default is today's date.
Est Maturity (estimated maturity)	Enter the estimated date of maturity.
Est Estate	Enter the anticipated total value of the estate when the bequest matures.
Present Value	Restate the estimated estate, adjusted for future inflation.

Bequest Status

Select *Advised-Verbal* (the default), *Advised-Written*, *In Probate*, or *Matured*. The values for this field are delivered with the system as translate values. You can modify these translate values.

Status Dt (status date)

The system displays the date that the bequest status was most recently updated.

Act Maturity (actual maturity)

Enter the date of actual maturity.

Act Estate

Enter the total amount of the estate.

Benefit to Institution**Estimated Value and Pct** (percent)

Enter the estimated value of the bequest or the percentage of the bequest that benefits your institution.

Other Beneficiaries**Beneficiary or Name**

Select the ID or enter the name of the beneficiary.

Estimated Value and Pct (percent)

Enter the estimated value or the percentage of the estate that has been willed to the beneficiary whom you identified in the Beneficiary or Name field.

Defining Constituent Bequest Details

Access the Bequest Detail 2 page.

Bequest Detail 2 page

Comments

Enter any additional comments about the bequest.

Asset Category

If assets are named in the will, you can select an asset category. Asset categories are defined on the Asset Types page.

Description	Enter a description (up to 60 characters) of the asset that is named in the will.
Asset Value	Enter the estimated monetary value of the asset.
Value Date	Enter the date on which the asset value was determined.
Date	If the bequest has been amended, select the codicil date.
Action to Will	Enter a brief description of the action taken, such as beneficiary change, amount change, and so on.
Description	Enter a more detailed description of the amendment.
Expected Date	If the amount bequeathed is to be paid to your institution in installments, enter the expected date of each installment.
Expected Amount	If the amount bequeathed is to be paid to your institution in installments, enter the expected amount of each installment.
Actual Date and Actual Amount	Once an installment is paid, enter the date and amount received.

Defining Institutional Bequest Information

Access the Bequest Information page.

The screenshot displays the 'Bequest Information' page with the following details:

- Navigation:** Bequest Detail, Bequest Detail 2, Bequest Information (selected)
- Prospect Info:** Gallagher, Shawn; ID: AV0001; Comments; Constituent Type: Alumni; Yr: 2001; Institution: PSUNV
- Intended Distribution:** View All, First, 1 of 1, Last. For: Scholarship for High School Leaders. Business Unit: PSUNV, Designation: EVERETTSCH, William C. Everett Scholarship, Type: Ultimate, Amount: 5,000,000.00 USD.
- External Contacts:** View All, First, 1 of 1, Last. ID: AV0030, Name: Dennison, Adele, Alliance: Donor Representative, Start Date: 06/19/1998, End Date: (blank), Address: (link).
- Assigned Staff:** View All, First, 1 of 1, Last. Staff ID: AV0024, Name: Perkins, Darla, Start Date: 06/05/1996, Role: SOL, Solicitor, End Date: (blank).

Bequest Information page

Tracking Trusts

You can track information that is related to trusts and benefits your institution. You can track various types of trusts, their values, the gifts made to them, their beneficiaries, and so on.

In addition, you can indicate the designations that benefit from the trust and the external contacts and staff members who handle the trust at your institution.

This section discusses how to:

- Define trust details.
- Define trust gift information.
- Define trust account information.
- Define trust beneficiaries.
- Enter information about how the trust will be handled by your institution.

Pages Used to Track Trusts

Page Name	Object Name	Navigation	Usage
Trust Detail	AV_TRUST_DTL	Manage Contributor Relations, Manage Prospects, Use, Trusts, Trust Detail	Enter information about a donor's trust that benefits your institution.
Trust Gift Information	AV_TRUST_GINFO	Manage Contributor Relations, Manage Prospects, Use, Trusts, Trust Gift Information	Record information about additional gifts made to an established trust.
Trust Account Information	AV_TRUST_AINFO	Manage Contributor Relations, Manage Prospects, Use, Trusts, Trust Account Information	Track accounts that are associated with a trust that benefits your institution.
Trust Beneficiaries	AV_TRUST_BFCY	Manage Contributor Relations, Manage Prospects, Use, Trusts, Trust Beneficiary	Track information about the benefit that your institution expects to receive and additional beneficiaries to a trust.
Trust Information	AV_TRUST_INFO	Manage Contributor Relations, Manage Prospects, Use, Trusts, Trust Information	Enter information about the distribution, external contacts, and assigned staff of a planned gift to your institution.

Defining Trust Details

Access the Trust Detail page.

Trust Detail		Trust Gift Information		Trust Account Information		Trust Beneficiary		Trust Information	
Gallegher, Shawn				ID: AV0001		Comments			
Constituent Type: Alumni				Yr: 2001		Institution: PSUNV			
<div>Trust Detail View All First 1 of 1 Last</div>									
*Trust Name:	Gallegher Family Trust								
*Trust ID:	347898					Trust Status: Active			
*Trust Type:	Remainder Trust					Inception Date: 01/01/1980			
Trust Category:	Regular Trust					Start Date: 03/15/1982			
Trust Term:	Fixed Number of Years					Est Maturity: 03/15/2040			
Principal:	4,000,000.00 USD					Trustee Fees: 500,000.00			
Payout Type:	Pct					Amount:			
Payout Term:	Annual					Percent: 5.00			
<div>Trust Value View All First 1 of 1 Last</div>									
Value Date	Market Value	Future Value	Value Source						

Trust Detail page

Trust Name and Trust ID

Enter a trust name (up to 60 characters long) and trust ID (up to 20 characters long).

Note. The trust ID serves as an IRS tax ID number and should not be duplicated from one trust to another.

Trust Type

Select a trust type. Values are *Unitrust*, *Annuity Trust*, *Remainder Trust*, and *Charitable Lead Trust*. Trust types are defined on the Setup Trust Type page.

Trust Category

Select a trust category. Values are *Unitrust*, *Regular Trust*, *Net Income Trust*, *Net Income Trust with Make-Up*, and *Dry Charitable Remainder Trust*. Trust categories are defined on the Setup Trust Category page.

Trust Term

Select the term that must be met before the trust is paid out. Values are *Fixed Number of Years*, *One Life*, and *Two Lives*.

Principal

Enter the amount of money with which the trust was funded.

Trust Status

Select the current state of the trust. Values are *Active*, *Inactive*, *Matured*, and *Under Agreement*.

Inception Date

Select the date that the trust commitment with your institution was reached. This date may or may not be the same as the start date.

Est Maturity

Select the date that the trust will mature.

Trustee Fees

Enter the amount of any fees that must be paid to the trustee.

Payout Type

Select the payout type. Values are *Fixed Amount* and *Percent*. Values for this field are delivered with the system as translate values. You can modify these translate values.

Amount	If you selected a payout type of <i>Fixed Amount</i> , enter the amount of each payout in this field.
Payout Term	Select the frequency with which payouts are made. Values are <i>Annual</i> , <i>Bi-Annual</i> , <i>Bi-Month</i> , <i>Monthly</i> , and <i>Quarterly</i> . Values for this field are delivered with the system as translate values. You can modify these translate values.
Percent	If you selected a payout type of <i>Percent</i> , enter the percentage of the trust that is given in each payout.
Value Date	Select the date the valuation is set.
Market Value	Enter the monetary value of the trust according to today's market.
Future Value	Enter the estimated monetary value of the trust on its maturity date.
Value Source	Enter a description (up to 25 characters) of the person or publication that provides information about the trust's valuation.

Defining Trust Gift Information

Access the Trust Gift Information page.

Trust Detail | **Trust Gift Information** | Trust Account Information | Trust Beneficiary | Trust Information

Gallegher, Shawn ID: AV0001 [Comments](#)
 Constituent Type: Alumni Yr: 2001 Institution: PSUNV

Trust Information View All First 1 of 1 Last
 Trust Name: Gallegher Family Trust Trust ID: 347898

Gift Information View All First 1 of 1 Last
 Gift Amount: [] USD Gift Type: [] Gift Date: [] [+][-]

Gift Value View All First 1 of 1 Last
 Value Date: 02/05/2001 Future Value: [] Liability: [] Value Source: [] [+][-]

Total Contributions: [] USD Total Income: []

Trust Gift Information page

Gift Amount and Gift Type	For each gift to the trust, enter the gift amount and select a gift type.
Gift Date	Select the date on which the gift was received by your institution.
Value Date	Select the date the valuation was set.
Future Value	Enter the estimated value of the new gift on its maturity date.
Liability	Enter the obligation to your institution for the additional payout for the new gift.
Value Source	Enter a description of the person or publication providing information about the estimated value.

Total Contributions Enter the total amount paid to the trust by the donor.

Total Income Enter the total amount paid from the trust to the donor.

Defining Trust Account Information

Access the Trust Account Information page.

Trust Detail Trust Gift Information **Trust Account Information** Trust Beneficiary Trust Information

Gallegher, Shawn ID: AV0001 [Comments](#)
 Constituent Type: Alumni Yr: 2001 Institution: PSUNV

Trust Information View All First 1 of 1 Last

Trust Name: Gallegher Family Trust Trust ID: 347898

Account Information View All First 1 of 1 Last

Item Type Type

Balance View All First 1 of 1 Last

Date	Balance	
		USD

Last Updated:

Trust Account Information page

Date and Balance Enter the date and associated account balance. You can track multiple account balances by date.

Last Updated The system displays the date and name of the person who last updated the information on this page.

Defining Trust Beneficiaries

Access the Trust Beneficiary page.

Trust Detail	Trust Gift Information	Trust Account Information	Trust Beneficiary	Trust Information
Gallegher, Shawn		ID: AV0001	Comments	
Constituent Type: Alumni		Yr: 2001	Institution: PSUNV	
Trust Information View All First 1 of 1 Last				
Trust Name: Gallegher Family Trust		Trust ID: 347898		
Inst Est Value: 2,000,000.00 USD		Inst Actual Value:		<input type="checkbox"/> Irrevocable
Campaign: CAMP2000 Campaign 2000				
Comments:				
Other Beneficiaries View All First 1 of 1 Last				
ID: AV0004	Name: Holmgren, June	Status: 1st		<input type="button" value="+"/> <input type="button" value="-"/>
Date of Birth:	SSN: 877-99-1333			
Estimated Value: 2,000,000.00	Actual Value:	Address		

Trust Beneficiary page

Defining Institutional Trust Information

Access the Trust Information page.

Trust Detail	Trust Gift Information	Trust Account Information	Trust Beneficiary	Trust Information
Gallegher, Shawn		ID: AV0001	Comments	
Constituent Type: Alumni		Yr: 2001	Institution: PSUNV	
Trust Information View All First 1 of 1 Last				
Trust Name: Gallegher Family Trust		Trust ID: 347898		
Intended Distribution View All First 1 of 1 Last				
For: Scholarship for Journalism Majors		<input type="button" value="+"/> <input type="button" value="-"/>		
Business Unit: PSUNV	Designation: EVERETTSCH William C. Everett Scholarship	Type: Ultimate	Amount: 2,000,000.00 USD	
External Contacts View All First 1 of 1 Last				
ID: AV0030	Dennison, Adele	Alliance: Donor Representative		<input type="button" value="+"/> <input type="button" value="-"/>
Start Date: 06/19/1998	End Date:	Address		
Assigned Staff View All First 1 of 1 Last				
Staff ID: AV0026	Burwell, Elizabeth	Start Date: 06/01/1998	<input type="button" value="+"/> <input type="button" value="-"/>	
Role:		End Date:		

Trust Information page

Tracking Gift Annuities

You can track information about gift annuities set up to benefit your institution. You can track various types of annuities, their rates, the assets that are used to fund them, the accounts that are associated with them, their beneficiaries, and their distribution.

This section discusses how to:

- Define gift annuity details.
- Define gift annuity beneficiaries.
- Define institutional gift annuity information.

Pages Used to Track Annuities

Page Name	Object Name	Navigation	Usage
Gift Annuity Details	AV_GIFTAN_DTL	Manage Contributor Relations, Manage Prospects, Use, Gift Annuities, Gift Annuity Details	Enter detailed information about a donor's gift annuity to your institution.
Gift Annuity Beneficiaries	AV_GIFTAN_BFCY	Manage Contributor Relations, Manage Prospects, Use, Gift Annuities, Gift Annuity Beneficiaries	Track information about the benefit that your institution expects to receive and additional beneficiaries to a trust.
Gift Annuity Information	AV_GIFTAN_INFO	Manage Contributor Relations, Manage Prospects, Use, Gift Annuities, Gift Annuity Information	Enter information about the distribution, external contacts, and assigned staff of a planned gift to your institution.

Defining Gift Annuity Details

Access the Gift Annuity Details page.

Gift Annuity Details		Gift Annuity Beneficiaries		Gift Annuity Information	
Gallegher, Shawn		ID:	AV0001	Comments	
Constituent Type: Alumni		Yr:	2001	Institution:	PSUNV
Gift Annuity Detail View All First 1 of 1 Last					
*Gift Annuity Name:	Gallegher Family Annuity + -				
*Gift Annuity Type:	Charitable	Inception Date:	06/05/1996		
Deferral Period:	0	Start Date:	06/16/1997		
Rate:	5.00	Gift Annuity Status:	Active		
Asset Category:	LAND	Land			
Gift Amount:	1,000,000.00	USD	Gift Annuity Date:	06/11/1996	
Reserve:	100,000.00	Liability:	175,000.00		
Account Information View All First 1 of 1 Last					
Item Type	Type				
<input type="text"/>	<input type="text"/>				
+ -					

Gift Annuity Details page

Gift Annuity Name	Enter the formal gift annuity name (up to 60 characters).
Gift Annuity Type	Select a gift annuity type, <i>Charitable</i> or <i>Deferred</i> . Values for this field are delivered with the system as translate values. You can modify these translate values.
Deferral Period	If you selected a gift annuity type of <i>Deferred</i> , enter the number of years that the annuity will be deferred.
Rate	Enter the rate at which payouts will be made to the donor over the term of the annuity. Your institution determines the rate based on the age of the donor at the time the gift is made.
Inception Date	Enter the date on which the gift annuity was established.
Gift Annuity Status	Select a gift annuity status: <i>Active</i> : Select to add a new gift annuity. <i>Inactive</i> : Select if your institution no longer recognizes this gift annuity.
Asset Category	Select the asset category that describes the assets used to fund the gift annuity. Asset categories are defined by your institution.
Gift Amount	Enter the gift amount of the contribution that was used to create the gift annuity.
Reserve	Enter the amount that your institution must carry to fund the annuity.
Gift Annuity Date	Enter the date that the contribution to fund the gift annuity was made to your institution.
Liability	Enter the amount that your institution is committed to pay out over the life of the gift annuity.

Defining Gift Annuity Beneficiaries

Access the Gift Annuity Beneficiaries page.

Gift Annuity Details		Gift Annuity Beneficiaries		Gift Annuity Information	
Gallegher,Shawn		ID:	AV0001	Comments	
Constituent Type: Alumni		Yr:	2001	Institution: PSUNV	
Gift Annuity Detail View All First 1 of 1 Last					
Gift Annuity Name:		Gallegher Family Annuity		Gift Annuity Date: 06/11/1996	
Inst Est Value:	1,000,000.00	USD	Inst Actual Value:		<input type="checkbox"/> Irrevocable
Campaign:	EDUCATION	College of Education Campaign			
Comments:					
Other Beneficiaries View All First 1 of 1 Last					
ID	Name	Status			
AV0004	Holmgren,June	1st		+ -	
Date of Birth:		SSN:	877-99-1333		
Estimated Value:	10,000.00	Actual Value:		Address	

Gift Annuity Beneficiaries page

Defining Institutional Gift Annuity Information

Access the Gift Annuity Information page.

Gift Annuity Details		Gift Annuity Beneficiaries		Gift Annuity Information	
Gallegher,Shawn		ID:	AV0001	Comments	
Constituent Type: Alumni		Yr:	2001	Institution: PSUNV	
Gift Annuity Detail View All First 1 of 1 Last					
Gift Annuity Name:		Gallegher Family Annuity		Gift Annuity Date: 06/11/1996	
Intended Distribution View All First 1 of 1 Last					
For:	The Women's Collegiate Fund				
Business Unit	Designation	Type	Amount		
PSUNV	WOMENSOFT	Women's Softball Program	Ultimate	10,000.00	USD
External Contacts View All First 1 of 1 Last					
ID:	AV0030	Dennison,Adele	Alliance:	Donor Representative	
Start Date:	06/19/1998	End Date:		Address	
Assigned Staff View All First 1 of 1 Last					
Staff ID:	AV0026	Burwell,Elizabeth	Start Date:	06/01/1998	
Role:	CM	Campaign Manager	End Date:		

Gift Annuity Information page

Tracking Pooled Income Funds

You can maintain information about the pooled income funds established at your institution for donors. For each donor who participates in a fund, you can track the units held, their value, additional gifts made, and so on. In addition, you can track information about the beneficiaries of the fund and distribution information.

This section discusses how to:

- Define pooled income fund details.
- Define pooled income fund beneficiaries.
- Define institutional pooled income fund information.

Pages Used to Track Pooled Income Funds

Page Name	Object Name	Navigation	Usage
Pooled Income Details	AV_PINC_DTL	Manage Contributor Relations, Manage Prospects, Use, Pooled Income Funds, Pooled Income Details	Enter information about a pooled income fund at your institution and the donor's contributions to the fund.
Pooled Income Beneficiaries	AV_PINC_BFCY	Manage Contributor Relations, Manage Prospects, Use, Pooled Income Funds, Pooled Income Beneficiaries	Track information about the benefit that your institution expects to receive and additional beneficiaries to a pooled income fund.
Pooled Income Information	AV_PINC_INFO	Manage Contributor Relations, Manage Prospects, Use, Pooled Income Funds, Pooled Income Information	Enter information about the distribution of the planned gift to your institution, external contacts, and assigned staff.

Defining Pooled Income Fund Details

Access the Pooled Income Details page.

Pooled Income Details		Pooled Income Beneficiaries		Pooled Income Information	
Gallegher, Shawn		ID:	AV0001	Comments	
Constituent Type: Alumni		Yr:	2001	Institution:	PSUNV
Pooled Income Details View All First 1 of 1 Last					
*Pooled Income Fund Name:		PSUNV Pooled Income Fund + -			
*Pooled Income Fund Type:		Balanced	Inception Date:	06/04/1992 + -	
Total Contributions:		25,000,000.00	USD	PIF Status:	Active + -
Units View All First 1 of 1 Last					
Units Held	Unit Value	Total Value	Date		
150	100.00 USD	1,500.00	06/22/1998 + -		
Gift Information View All First 1 of 1 Last					
Gift Amt:	3.00 USD	Units Purch:	2	Date:	06/25/1998 + -
Gift Value View All First 1 of 1 Last					
Value Date	Present Value	Liability			
06/25/1998 + -	1,800.00 USD	180.00 + -			
Account Information View All First 1 of 1 Last					
*Item Type:	<input type="text"/>	*Type:	<input type="text"/>	+ -	

Pooled Income Details page

- Pooled Income Fund Name** Enter the formal pooled income fund name (up to 60 characters).
- Pooled Income Fund Type** Select a pooled income fund type. Values include *Balanced*, *High Yield*, and any values your institution defines.
- Values for this field are delivered with the system as translate values. You can modify these translate values.
- Total Contributions** Enter the total contributions made by this donor to the pooled income fund.
- Inception Date** Select the date on which the pooled income fund agreement was established.
- PIF Status** (pooled income fund status) Select the PIF status. Values are:
- Active:* Select when you add a new pooled income fund.
- Inactive:* Select if your institution no longer recognizes this donor's participation in the fund.
- Units Held** Enter the total number of units that the donor has purchased in the pooled income fund.
- Unit Value** Enter the monetary value of a single unit in the pooled income fund.
- Total Value** Enter the total value of the units that the donor has purchased from within the pooled income fund.
- Date** Select the date on which the total value was set.
- Gift Amt** (gift amount) If the donor purchases additional units in the pooled income fund, enter the amount of the gift used to purchase the units.

Units Purch (units purchased)	Enter the number of units that the gift amount purchased in the pooled income fund.
Date	Select the date that the gift was made to purchase units in the pooled income fund.
Value Date	Select the date that the valuation is set.
Present Value	Enter the present value of the pooled income fund in today's market.
Liability	Enter the amount of liability created for your institution by the addition of units to the constituent's total units in the fund.

Defining Pooled Income Fund Beneficiaries

Access the Pooled Income Beneficiaries page.

Pooled Income Details | Pooled Income Beneficiaries | Pooled Income Information

Gallagher, Shawn ID: AV0001 [Comments](#)
 Constituent Type: Alumni Yr: 2001 Institution: PSUNV

Pooled Income Details View All First 1 of 1 Last

Fund Name: PSUNV Pooled Income Fund Inception Date: 06/04/1992
 Inst Est Value: 1,600.00 USD Inst Actual Value: ☐ Irrevocable
 Campaign: CAMP2000 Campaign 2000
 Comments:

Other Beneficiaries View All First 1 of 1 Last

ID	Name	Status
AV0004	Holmgren, June	1st

Date of Birth: SSN: 877-99-1333 [Address](#)
 Estimated Value: 200.00 Actual Value:

Pooled Income Beneficiaries page

Defining Institutional Pooled Income Fund Information

Access the Pooled Income Information page.

Pooled Income Details		Pooled Income Beneficiaries		Pooled Income Information	
Gallegher, Shawn		ID:	AV0001	Comments	
Constituent Type: Alumni		Yr:	2001	Institution: PSUNV	
Pooled Income Details View All First 1 of 1 Last					
Fund Name: PSUNV Pooled Income Fund		Inception Date: 06/04/1992			
Intended Distribution View All First 1 of 1 Last					
For: Campaign 2000 + -					
Business Unit	Designation	Type	Amount		
PSUNV	CAPCAMP2000	Capital Campaign 2000 Fund	Interim	1,600.00	USD
External Contacts View All First 1 of 1 Last					
ID:	AV0030	Dennison, Adele	Alliance:	Donor Representative + -	
Start Date:	06/22/1998	End Date:	Address		
Assigned Staff View All First 1 of 1 Last					
Staff ID:	AV0024	Perkins, Darla	Start Date:	06/07/1998 + -	
Role:	SOL	Solicitor	End Date:		

Pooled Income Information page

Working With a Planned Giving Profile

This section discusses how to:

- View planned giving profiles.
- View bequest details.
- View additional bequest details.
- View trust details.
- View trust beneficiaries.
- View trust gift information.
- View trust account information.
- View gift annuity details.
- View gift annuity beneficiaries.
- View gift annuity account information.
- View pooled income fund details.
- View pooled income fund beneficiaries.
- View planned giving institutional information.

Pages Used to Work With a Planned Giving Profile

Page Name	Object Name	Navigation	Usage
Planned Giving Profile	AV_PG_PROFILE, AV_PG_PROFILE1	<ul style="list-style-type: none"> Manage Contributor Relations, Manage Prospects, Use, Planned Giving Profile Manage Contributor Relations, Manage Prospects, Inquire, Planned Giving Profile 	Summarize information about a constituent's participation as a prospective or actual donor of a planned gift.
Bequest Detail	AV_BEQUEST1_SP	Click the Details link on the Planned Giving Profile page.	View additional information about a bequest.
Bequest Detail 2	AV_BEQUEST2_SP	Click the Details 2 link on the Bequest Detail page.	View additional information about any assets, codicils, installments, or comments.
Trust Detail	AV_TRUST1_SP	Click the Details link on the Planned Giving Profile page.	View detailed information about a trust.
Trust Beneficiaries	AV_TRUST2_SP	Click the Beneficiaries link on the Trust Detail page.	View information about the trust's beneficiaries.
Trust Gift Information	AV_TRUST3_SP	Click the Gift Information link on the Trust Detail page.	View information about gifts made to the established trust.
Trust Account Information	AV_TRUST4_SP	Click the Account Information link on the Trust Detail page.	View information about the designation and balance of a trust account.
Gift Annuity Detail	AV_GIFTAN1_SP	Click the Details link on the Planned Giving Profile page.	View detailed information about the gift annuity.
Gift Annuity Beneficiaries	AV_GIFTAN2_SP	Click the Beneficiaries link on the Gift Annuity Detail page.	View information about an annuity's beneficiaries.
Gift Annuity Account Info (gift annuity account information)	AV_GIFTAN4_SP	Click the Account Information link on the Gift Annuity Detail page.	View information about the account associated with a gift annuity.
Pooled Income Fund Detail	AV_PINC1_SP	Click the Details link on the Planned Giving Profile page.	View detailed information about a donor's portion of a pooled income fund.
Pooled Income Fund Beneficiaries	AV_PINC2_SP	Click the Beneficiaries link on the Pooled Income Fund Detail page.	View additional details about a donor's portion of a pooled income fund.
Information	AV_BEQUEST3_SP	<ul style="list-style-type: none"> Click the Information link on the Pooled Income Fund Detail page. Click the Information link on the Gift Annuity Detail page. Click the Information link on the Pooled Income Fund Detail page. 	View information about distribution, external contacts, and assigned staff.

Viewing a Planned Giving Profile

Access the Planned Giving Profile page.

Planned Giving Profile

Gallegher, Shawn
ID: AV0001
[Comments](#)

Constituent Type: Alumni
Yr: 2001
Institution: PSUNV

Date of Birth: 07/03/1964
Date of Death:

Initial Request Date:
Initial Response Date:
PG Status:
☐ Include on PG Mailing List

Planned Gifts					View All	First	1-4 of 4	Last
	Type	Planned Gift Name	Inception Date	Start Date	Details			
1	Bequest	Bequest	06/19/1998		Details			
2	Trust	Gallegher Family Trust	01/01/1980	03/15/1982	Details			
3	Gift Annuity	Gallegher Family Annuity	06/05/1996	06/16/1997	Details			
4	Pooled Income	PSUNV Pooled Income Fund	06/04/1992		Details			

Planned Giving Profile page

If This Page is Accessed Through the Use Menu

- Initial Request Date** Enter the date on which the donor first inquired about a planned gift.
- Initial Response Date** Enter the date on which your institution responded to the donor's request for information.
- PG Status** (planned giving status) Select a planned giving status. Values include *Prospect*, *Suspect*, *In Discussion*, *Proposal Pending*, and *Donor*.
- Values for this field are delivered with the system as translate values. You can modify these translate values.
- Include on PG Mailing List** (include on planned giving mailing list) Select to include the donor in your institution's planned giving mailing list.

From the Use or Inquire Menu

For each planned gift, you can view the gift type, name, inception date, start date, institution estimated value, and the institution actual value.

Details Click this link on any line with bequest information to view detailed information about the bequest on the Bequest Detail page.

Details Click this link on any line with trust information to view detailed information about the trust on the Trust Detail page.

Details Click this link on any line with gift annuity information to view detailed information about the gift annuity on the Gift Annuity Detail page.

Details

Click this link on any line with pooled income fund information to view detailed information about the donor's portion of the pooled income fund on the Pooled Income Fund Detail page.

CHAPTER 16

Managing Initiatives

This chapter provides an overview of initiative management and discusses how to:

- Define an initiative.
- Define an initiative audience.
- Link related initiatives.
- Designate initiative resources.
- Define a public relations (PR) plan.
- Create an initiative budget and track expenses.
- Create initiative actions.
- View initiative action summary information.
- View related goals.
- Viewing responsible staff for related initiatives.
- Use mass change for communications to initiative audiences.

See Also

[Chapter 17, “Managing Campaigns,” page 301](#)

[Chapter 18, “Managing Membership,” page 313](#)

[Chapter 19, “Managing Volunteers,” page 351](#)

[Chapter 20, “Managing Event Initiatives,” page 361](#)

[Chapter 21, “Managing Other Initiatives,” page 367](#)

Understanding Initiatives

To manage any type of initiative (campaign, volunteer effort, membership initiative, event, or other type of initiative):

1. Create the initiative.
2. (Optional) Define the audience.
3. (Optional) Link related initiatives.
4. (Optional) Assign resources.

5. (Optional) Create a public relations (PR) plan.
6. (Optional) Create a budget.
7. (Optional) Track budget expenses.
8. (Optional) Create initiative actions.
9. (Optional) View action summary information.
10. (Optional) View related goals.
11. (Optional) View responsible staff for related initiatives.
12. (Optional) Create initiative or membership letters.

Prerequisites

Before you can manage any type of initiative, you must have completed its setup. All initiatives use a few common setup pages, and some initiatives require additional setup that is specific to their function.

See Also

[Chapter 6, “Setting Up Initiatives,” page 67](#)

[Chapter 7, “Setting Up Campaigns,” page 87](#)

[Chapter 8, “Setting Up Membership Initiatives,” page 95](#)

[Chapter 9, “Setting Up Volunteer Efforts,” page 99](#)

[Chapter 10, “Setting Up Event Initiatives,” page 109](#)

[Chapter 11, “Setting Up Other Initiatives,” page 111](#)

Defining an Initiative

This section discusses how to create any type of initiative.

Pages Used to Create Initiatives

Page Name	Object Name	Navigation	Usage
Campaign	AV_INTV_CMPGN_MAIN	Manage Contributor Relations, Manage Campaigns, Use, Campaign Initiatives, Campaign	Begin the process of defining a new campaign initiative at your institution.
Membership	AV_INTV_MEMBR_MAIN	Manage Contributor Relations, Manage Memberships, Use, Membership Initiatives, Membership	Begin the process of defining a membership initiative at your institution.
Volunteers	AV_INTV_VOL_MAIN	Manage Contributor Relations, Manage Volunteers, Use, Volunteer Initiative, Volunteers	Begin the process of defining a new volunteer initiative at your institution.
Event	AV_INTV_EVNT_MAIN	Manage Contributor Relations, Manage Events, Use, Event Initiatives, Event	Begin the process of defining a new event initiative at your institution.
Other Initiatives	AV_INTV_OTHR_MAIN	Manage Contributor Relations, Manage Other Initiatives, Use, Other Initiatives, Other Initiatives	Begin the process of defining a new initiative at your institution that is not a campaign, membership initiative, event initiative, or volunteer effort.

Creating an Initiative

Depending on the type of initiative you want to create, access the Campaign, Membership, Volunteers, Event, or Other Initiatives page.

Campaign
Audience
Related Initiative
Resources
PR Plan

Campaign: ANNFUND **Institution:** PSUNV

Name: Annual Fund Campaign
Description: Annual fundraising campaign to alumni and friends

***Start Date:** 07/01/1998 **End Date:** 06/30/1999 **Reporting Level:** 2
***Status:** Active ***Business Unit:** ***Phase:** Public
% Participtn Goal: 35.00 **Financial Goal:** 5,000,000.00 USD

Responsible Person View All First 1 of 1 Last
Person: 8664 Carroll, Bruce ***Eff Date:** 01/10/2001

Responsible Department View All First 1 of 1 Last
Department: ***Start Date:** 01/10/2001 **End Date:** 06/30/1999

Campaign page

Fields Common to All Initiatives

Name	Name the initiative, up to 60 characters.
Reporting Level	<p>Enter a reporting level for the initiative. The highest reporting level is <i>1</i>. The lowest reporting level is <i>999</i>. You will receive an error message if you enter an incorrect reporting level.</p> <p>A level <i>1</i> initiative cannot be related to another level <i>1</i> initiative of the same type. For example, a level <i>1</i> campaign cannot be related to another level <i>1</i> campaign. Reporting levels are critical when relating other initiatives to an initiative on the Related Initiatives page. Note that you cannot relate any campaigns to events. Events must be in context of the larger campaign; a campaign drives what is related to it.</p>
Business Unit	<hr/> <p>Note. Your selection determines the values you can choose from when selecting a responsible department, creating department goals, selecting a public relations appeal, and selecting an appeal for a budget expense.</p> <hr/>
% Participtn Goal (percent participation goal) and Financial Goal	<p>Enter a participation goal percentage and a financial goal for the initiative. Goals indicate the amount of or percentage increase in participation that you expect to receive as a result of the initiative.</p> <p>For campaign initiatives, these fields are used in the Campaign Progress Report. For memberships, these fields are used in the Membership Progress page.</p>
Person	Select a responsible person for the initiative. This field populates by default to the user ID of the person defining the initiative, but can be overridden. To select a new responsible person, click the Quick Search button and select the appropriate ID. Once a responsible person is selected, his or her name appears to the right of this field. Only one person can be responsible for an initiative at a given time.
Department	Select a responsible department for the initiative. The prompt box displays a listing of all the departments associated with the setID for the business unit that you select for this initiative.

If You Are Creating a Campaign Initiative

Phase	<p>Select a phase to indicate whether the initiative is currently <i>Private</i> or <i>Public</i>.</p> <p>You may want to begin the campaign privately, identifying the pace-setting gifts that form the nucleus fund of the campaign. Once the campaign has some momentum from the private phase, you can take it public to complete its goals.</p>
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If You Are Creating a Membership Initiative

Mbr Org (member organization)	Enter the member organization. This code identifies which member organization at your institution owns the membership initiative. The first initiative that you create might not have values in this field because no values might have been set up yet. If so, leave this field blank and return to complete it after you create the appropriate member organization.
--------------------------------------	--

If You Are Creating a Volunteer Initiative

Nbr Vol Goal (number of volunteers goal)	Enter the number of volunteers you want to be involved in the initiative.
Vol Pool Goal (volunteer pool goal)	Enter the number of constituents you must invite to participate to generate the number of volunteers goal.

If You are Creating an Event Initiative

Event ID	If you have already created this event on the Event page, select the event ID to assign to this event initiative. Otherwise, click the New ID button to create an event. After you create an event and save the Event page, the system creates an event ID and automatically enters the new ID here.
New ID	Click to create an event for this event initiative. When you click this button, the system automatically populates the Event page with key values that you entered here. To assist you in creating the event record, the system transfers the event code that you are defining to the Short Description field, the name that you enter to the Description field, and the institution that you select to the Institution field. See <i>PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook</i> , “Managing Events Data”.
Attendance Goal	Enter a goal that states the expected number of constituents who will attend the event.

If You Are Creating an Other Initiative

Intv Type (initiative type)	Enter an initiative type. The type you enter should be one not defined by your institution as <i>Campaign</i> , <i>Membership</i> , <i>Volunteer</i> or <i>Event</i> .
------------------------------------	--

Defining an Initiative Audience

This section discusses how to create an audience for your initiative. Audiences are populations and sub-populations of constituents related to an initiative.

Understanding Audiences

You need an audience in order to communicate; the Audience page helps you identify your target market. There are three types of audiences:

- Reporting audience

An example is the need to report quarterly to the Board of Regents.

- Administrative audience

An example is the need to notify the group of people managing the initiative.

- Segmentation

This piece is tied to communications.

Pages Used to Create an Initiative Audience

Page Name	Object Name	Navigation	Usage
Audience	AV_INTV_CMPGN_AUD, AV_INTV_EVNT_AUD, AV_INTV_MEMBR_AUD, AV_INTV_VOL_AUD, AV_INTV_OTHR_AUD	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Use, Campaign Initiatives, Audience • Manage Contributor Relations, Manage Membership, Use, Membership Initiatives, Audience • Manage Contributor Relations, Manage Volunteers, Use, Volunteer Initiatives, Audience • Manage Contributor Relations, Manage Events, Use, Event Initiatives, Audience • Manage Contributor Relations, Manage Other Initiatives, Use, Other Initiatives, Audience 	Define the target audiences, or populations and sub-populations of constituents related to an initiative.
Audience Detail	AV_AUD_CRIT_SP	Click the Audience Detail button on the Audience page.	View additional information about an audience.

Page Name	Object Name	Navigation	Usage
Initiative Audience Build	AV_RUNCTL_INTV	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Process, Initiative Audience Build, Initiative Audience Build • Manage Contributor Relations, Manage Memberships, Process, Initiative Audience Build, Initiative Audience Build • Manage Contributor Relations, Manage Volunteers, Process, Initiative Audience Build, Initiative Audience Build • Manage Contributor Relations, Manage Events, Process, Initiative Audience Build, Initiative Audience Build • Manage Contributor Relations, Manage Other Initiatives, Process, Initiative Audience Build, Initiative Audience Build 	Run the AVPINT process that builds the audiences that are used for initiatives.
Initiative Audience Merge	AV_RUNCTL_INTV_MRG	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Process, Initiative Audience Merge, Initiative Audience Merge • Manage Contributor Relations, Manage Memberships, Process, Initiative Audience Merge, Initiative Audience Merge • Manage Contributor Relations, Manage Volunteers, Process, Initiative Audience Merge, Initiative Audience Merge • Manage Contributor Relations, Manage Events, Process, Initiative Audience Merge, Initiative Audience Merge • Manage Contributor Relations, Manage Other Initiatives, Process, Initiative Audience Merge, Initiative Audience Merge 	Run the AVPIMRG process that moves audiences from the temporary table AV_INTV_TMP_TBL to the permanent table AV_INITIATIVES.

Defining the Audience

Access the Audience page.

Note. Before assigning an audience to an initiative, you must create the audience by defining attribute types, then define audience criteria based on those attribute types.

CampaignAudienceRelated InitiativeResourcesPR Plan

Campaign: ANNFUNDAnnual Fund CampaignInstitution: PSUNV

AudienceView AllFirst1 of 1Last

*Pers/Org	Audience	Description	Audience Type	
Organization	ORGS	Organization Records	Segmentatn	Audience Detail + -
Query Name:		Workset Name:		

Audience page

When you define an audience, you specify which particular group of constituents to reach through the initiative. For example, a reunion event might target all the constituents in the Class of 1990.

Use the audiences that you define to identify who receives particular messages as a result of your public relations plan and to set intermediate goals for the initiative. However, to actually build the audience for the initiative, you must use the Initiative Audience Build and Initiative Audience Merge pages.

Note. Audiences must be linked to an initiative in order to use Mass Change to assign communications to audience members.

Pers/Org (person/organization)	Select either <i>Person</i> or <i>Organization</i> to determine the type of constituents in your audience.
Audience	Make a selection from the prompt box containing a list of all the audiences for either persons or organizations defined by your institution. This list includes only those defined on the Audience Criteria page.
Audience Type	<p>Select the reason that the audience you entered has been chosen. Values for this field (<i>Segmentation</i>, <i>Reporting</i>, and <i>Administrative</i>) are delivered with your system as translate values. <i>Segmentation</i> is a required value. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.</p> <p>Use <i>Reporting</i> to report the progress of the campaign. Use <i>Administrative</i> to create an audience of those responsible for the campaign. Use <i>Segmentation</i> for marketing purposes.</p>

Note. Segmentation is the only type available for setting campaign goals.

Select *Segmentation* to include this audience for this initiative in the list of Audience Code values on the Initiative Goals page and PR Plan page. *Reporting* and *Administration* are not relevant to the Initiative Goals page.

Query Name

If desired for future reference, enter the current query name used in your reporting tool when running reports on the audience.

Workset Name

If you use a workset containing the members of the audience, enter the name. Enter only those worksets that you have access to.

Audience Detail

Click to open the Audience Detail page. This page displays the criteria that defines the audience. You should review this information to ensure that you select the correct audience.

See Also

[Chapter 6, “Setting Up Initiatives,” Setting Up Attribute Types, page 72](#)

[Chapter 6, “Setting Up Initiatives,” Entering Audience Criteria, page 74](#)

Building the Audience

Access the Initiative Audience Build page.

Initiative Audience Build

Run Control ID: PS [Report Manager](#) [Process Monitor](#) [Run](#)

Initiative	Pers/Org	Audience Code	Audience Type
SCHOLARSHIP	P	ALUMNI	S
SCHOLARSHIP	P	BAND	R
SCHOLARSHIP	P	INDIVIDUAL	S

Total Build Count: 4

Initiative Audience Build page

This process generates the actual list of audience members and stores it in a temporary table called AV_INTV_TMP_TBL. Once the records are in this table you can analyze them to determine if the audience is acceptable.

To build the audience initially, click Run to run the Initiative Audience Build process. This process builds the audiences that you select on this page and any defined audiences that have not previously been built.

Note. Once you build an audience, audience members are not purged if they no longer meet the audience criteria.

If you have already built an audience, to rebuild it use the Rebuild Audience group box to enter your criteria. When you rebuild an audience the process adds any additional constituents that meet the audience criteria since the time the audience was last built.

After you run the Initiative Audience Build process you must manually purge the AV_INTV_TMP_TBL table.

Initiative	Select the initiative to which the audience applies.
Total Build Count	Displays the number of audiences that are built when you run this process. If the total build count is 0, an error message appears. This number increases with each rebuild you specify.

Note. The Total Build Count field must have a count of at least 1 before running the Initiative Audience Build process.

Merging the Audience

When you click the Run button, Process Scheduler runs the Initiative Audience Merge process at user-defined intervals.

This process merges any audiences in the temporary table with the permanent table.

Linking Related Initiatives

This section discusses how to link additional, related initiatives to the one you are creating.

Page Used to Link Related Initiatives

Page Name	Object Name	Navigation	Usage
Related Initiatives	AV_INTV_CMPGN_RLTD, AV_INTV_EVNT_RLTD, AV_INTV_MEMBR_RLTD, AV_INTV_VOL_RLTD, AV_INTV_OTHR_RLTD	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Use, Campaign Initiatives, Related Initiatives • Manage Contributor Relations, Manage Membership, Use, Membership Initiatives, Related Initiatives • Manage Contributor Relations, Manage Volunteers, Use, Volunteer Initiatives, Related Initiatives • Manage Contributor Relations, Manage Events, Use, Event Initiatives, Related Initiatives • Manage Contributor Relations, Manage Other Initiatives, Use, Other Initiatives, Related Initiatives 	Link the initiative you are creating or updating to existing active initiatives.

Assigning Related Initiatives

Access the Related Initiative page.

Related Initiative page

You can link campaigns, volunteer efforts, membership initiatives, events, or other institution-defined initiative types as a sub-unit of an initiative.

- Type** Select the initiative type to relate to the initiative with which you are working, such as *Campaign*, *Event*, *Membership*, *Other*, and *Volunteer*.
- Level** Select the reporting level of the initiative to relate to the initiative that you are working with. Select a level from *1* to *999*. Level *1* is the highest reporting level; you cannot relate same-type initiatives with the same reporting level.
- Intv Cd (initiative code)** Select the initiative code for the initiative to relate to the initiative with which you are working.

Important! Event, volunteer, membership, and other initiatives can be related to a campaign only when the campaign is retrieved on this page. This ensures the correct hierarchy for campaign reporting.

Assigning Initiative Resources

This section discusses how to assign.

Page Used to Assign Initiative Resources

Page Name	Object Name	Navigation	Usage
Resources	AV_INTV_CMPGN_RSRC, AV_INTV_EVNT_RSRC, AV_INTV_MEMBR_RSRC, AV_INTV_VOL_RSRC, AV_INTV_OTHR_RSRC	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Use, Campaign Initiatives, Campaign Resources • Manage Contributor Relations, Manage Membership, Use, Membership Initiatives, Membership Resources • Manage Contributor Relations, Manage Volunteers, Use, Volunteer Initiatives, Volunteer Resources • Manage Contributor Relations, Manage Events, Use, Event Initiatives, Event Resources • Manage Contributor Relations, Manage Other Initiatives, Use, Other Initiatives, Other Resources 	Maintain information about the human resources that support an initiative.

Assigning Initiative Resources

Access the Resources page.

Volunteers		Audience		Related Initiative		Resources		PR Plan	
Volunteer:		ALUMADM Alumni Admissions Recruitment Network				Institution:		PSUNV	
Responsible Manager						View All First 1 of 1 Last			
10001		Chavez, John Joseph		*Start Date:		01/15/2001		+	
Staff Role:		VC Volunteer Coordinator		End Date:		12/31/2001		-	
Other Primary Staff Resources						View All First 1 of 1 Last			
8664		Carroll, Bruce		*Start Date:		01/15/2001		+	
Staff Role:		ACK Acknowledgement Coordinator		End Date:		12/31/2001		-	
Responsible Unit						View All First 1 of 1 Last			
ALUMREL		Alumni Reunions Team		*Start Date:		01/15/2001		+	
Unit Role:		SOL Solicitor		End Date:		12/31/2001		-	
Resource Type		Initiative Type		Initiative		Volunteer Structure		New Vol	
Initiative									

Resources page

You assign the responsible person for an initiative on the initial definition page in the component, but you maintain information about other resources associated with the initiative on this page.

Responsible Manager

This is the person, above the responsible person, who should get reports and notifications related to the initiative. Only valid defined staff and units are available for assignment.

Staff Role

Enter the role of the responsible manager at the institution. Examples of staff roles are *Prospect Manager*, *Campaign Manager*, *Solicitor*, and so on. Roles are defined by your institution using the Roles page. Only valid defined staff and units are available for assignment.

Other Primary Staff Resources

Enter any other staff members who are participating in the initiative, such as the class giving officer or the reunion manager. Only valid defined staff and units are available for assignment.

Important! These resources only need to be linked here if the person's assignment has not been established as the responsible person for a related initiative.

Staff Role

Enter the role of the staff member at the institution. Examples of staff roles are *Prospect Manager*, *Campaign Manager*, *Solicitor*, and so on. Roles are determined by your institution.

Responsible Unit

Enter the name of the unit that is responsible for the initiative.

Unit Role

Enter the purpose of the unit at the institution. Roles are determined by your institution.

Rsrc Type (resource type)

Assign a volunteer as a resource. Values include *Initiative* or *Mbr Org* (member organization).

Intv Type (initiative type)	If you select <i>Initiative</i> as a resource type, select an initiative type associated with the volunteer.
Initiative	If you selected <i>Initiative</i> as a resource type, select the initiative with which the volunteer is associated.
Mbr Org Code	If you selected <i>Mbr Org</i> as a resource type, select the code with which the volunteer is associated.
Volunteer Structure	To assign a volunteer as a resource, select a volunteer structure code for the volunteer. This prompt is only active if you have a defined volunteer structure assigned to this initiative. If you do not have a volunteer structure defined, click the New Vol button to create one.
New Vol (new volunteer)	Click to access the Volunteer Structure page, where you can structure a new volunteer leadership group to assign specifically to this initiative.

Defining a Public Relations Plan

This section discusses how to define a public relations plan for an initiative.

Page Used to Define a PR Plan

Page Name	Object Name	Navigation	Usage
PR Plan (public relations plan)	AV_INTV_CMPGN_PLAN, AV_INTV_EVNT_PLAN, AV_INTV_MEMBR_PLAN, AV_INTV_VOL_PLAN, AV_INTV_OTHR_PLAN	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Use Campaign Initiatives, Campaign PR Plan • Manage Contributor Relations, Manage Membership, Use, Membership Initiatives, Membership PR Plan • Manage Contributor Relations, Manage Volunteers, Use, Volunteer Initiatives, Volunteer PR Plan • Manage Contributor Relations, Manage Events, Use, Event Initiatives, Event PR Plan • Manage Contributor Relations, Manage Other Initiatives, Use, Other Initiatives, Other Pr Plan 	Define an overall plan for communicating the purpose and progress of an initiative to a variety of audiences.

Defining a Public Relations Plan

Access the PR Plan page.

PR Plan page

When you create a public relations plan, the system generates a to do list record for the people assigned to particular steps or tasks within the plan. In addition, the public relations plan is written to the overall action plan for the initiative.

Message Enter information about the content of the actual communication that is sent.

Method Select how the message is delivered, such as an invitation, newsletter, meeting, report, email, and so on. Methods are defined by your institution using the Methods page.

Frequency Select how often a communication is sent. Frequencies include *Daily*, *Weekly*, *Monthly*, *Quarterly*, *Bi-Annually*, or *Annually*. The values for this field are delivered with your system as translate values. You can modify these translate values.

Important! The combination of frequency and start date establishes the dates that actions are triggered to a to do list for the people who are assigned the responsibility for carrying out the task

Appeal Select an appeal to relate the public relations plan to a specific appeal defined for the initiative. For example, *Annual Honor Roll* may be the message and the enclosed envelope for an additional gift may have a defined appeal to track. Appeals are defined by your institution using the Appeals page. Available options include all the valid appeals for the setID associated with the business unit that you select for the initiative.

Completed	Select to indicate that a communication has already been generated and sent and that the planned cycle (start date to end date) is complete or the step is no longer needed in the plan.
Audience Type and Audience	Select an audience type and an audience for the communication. Audiences include only those defined on the Audience page for this initiative.
Seq Nbr (sequence number)	Indicates which step you are creating in the public relations plan.
Build Actions	Once you have specified a message, method, frequency, appeal, assigned ID, and audience, click this button. The system generates initiative actions that correspond with your public relations tasks. For example, if you create a task of sending a monthly letter to alumni, the system creates an initiative action for the assigned staff for each date that the letter is to be sent. This date is based on the start and end dates of the public relations plan step.

Important! You can only build actions for a step once, so plan your steps carefully. Be certain that your dates and frequency—as well as the values in your Message, Appeal, and Responsible Person fields—are correct before directing the system to build actions. You do not have to build actions until you are ready. You can save the page and build the public relations plan actions later. Once actions are built, any subsequent changes to an action require you to manually update them using the Initiative Action page.

Important! If you do not click the Build Actions button, you receive a message when you save the page asking to build actions for the initiative. If you click Yes, actions are created for all of the steps that have not yet been built. If you click No, the plan data is saved and no actions are created at this time. If you add steps to the public relations plan at a later date, the Build Actions button becomes active and you can build actions for the new steps. The actions that display on your To Do List are determined by the setting you make in the Reminder Days field on the Institution Installation 2 page.

Creating an Initiative Budget and Tracking Expenses

This section discusses how to:

- Create a budget.
- Track budget expenses.

You can create a simple expense budget for an initiative. A budget can be broken down into budget categories, and a portion of the budget can be allocated to each category. In addition, you can track specific expenses associated with the initiative.

Note. Your PeopleSoft Contributor Relations budget system does not support links to your institution's financial system.

Pages Used to Create a Budget and Track Expenses

Page Name	Object Name	Navigation	Usage
Budget	AV_INTV_CMPGN_BDGT, AV_INTV_EVNT_BDGT, AV_INTV_MEMBR_BDGT, AV_INTV_VOL_BDGT, AV_INTV_OTHR_BDGT	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Use, Campaign Budget • Manage Contributor Relations, Manage Membership, Use, Membership Budget • Manage Contributor Relations, Manage Volunteers, Use, Volunteer Budget • Manage Contributor Relations, Manage Events, Use, Event Budget • Manage Contributor Relations, Manage Other Initiatives, Use, Other Budget 	Create a simple expense budget for an initiative.
Budget Detail	AV_INTV_CMPGN_BDTL, AV_INTV_EVNT_BDTL, AV_INTV_MEMBR_BDTL, AV_INTV_VOL_BDTL, AV_INTV_OTHR_BDTL	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Use, Campaign Budget Detail • Manage Contributor Relations, Manage Membership, Use, Membership Budget Detail • Manage Contributor Relations, Manage Volunteers, Use, Volunteer Budget Detail • Manage Contributor Relations, Manage Events, Use, Event Budget Detail • Manage Contributor Relations, Manage Other Initiatives, Use, Other Budget Detail 	Track the specific expenses for an initiative.

Creating a Budget

Access the Budget page.

Budget

Campaign: ANNFUND Annual Fund Campaign **Institution:** PSUNV

Overall Budget: USD

View All First ◀ 1-3 of 3 ▶ Last

*Budget Category	Category Budget	
<input type="text" value="PRIN"/> Printing/Publications	<input type="text" value="500,000.00"/>	<input type="button" value="+"/> <input type="button" value="-"/>
<input type="text" value="POST"/> Postage	<input type="text" value="100,000.00"/>	<input type="button" value="+"/> <input type="button" value="-"/>
<input type="text" value="TRAN"/> Transportation Costs	<input type="text" value="100000"/>	<input type="button" value="+"/> <input type="button" value="-"/>

Budget page

You can break down a budget into budget categories and allocate a portion of the budget to each category.

- Overall Budget** Enter the total amount allocated as the expense budget for the initiative.
- Budget Category** Enter the category to which you want to allocate a portion of the overall budget. Categories are defined by your institution using the Budget Table page. When you select a category, its description displays to the right of this field.
- Category Budget** Enter the amount of the overall budget allocated to the category that you selected.

An error message displays if the total amount budgeted to specific categories does not equal the overall budget. You cannot save a budget that exceeds the overall budget.

Warning! The system does not prevent overspending of your budget. The Budget feature within PeopleSoft Contributor Relations does not link to your Financials system.

Tracking Budget Expenses

Access the Budget Detail page.

Budget Detail

Campaign: ANNFUND Annual Fund Campaign **Institution:** PSUNV

Overall Budget: 0.00 USD

View All First ◀ 1 of 1 ▶ Last

Start Date	*Budget Category	Description	Appeal	Expense Amount	
<input type="text" value="01/17/2001"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="0.00"/>	<input type="button" value="+"/> <input type="button" value="-"/>

Budget Detail page

Budget Category	Select the category to which the expense or refund is assigned. Only those budget categories defined for the initiative type you are working with appear.
Description	Describe the expense, entering up to 25 characters.
Appeal	<p>(Optional) If the expense relates to a specific appeal, select the appropriate one. Appeals are defined by your institution using the Appeals page. The appeals from which you can select are determined by the setID associated with the business unit that you select for the initiative.</p> <p>You must link each expense with an appeal in order to accurately track expenses for that appeal.</p>
Expense Amount	Enter the amount of the expense. If you are entering a refund from a vendor, enter the item as a negative number.

Warning! When you save this page, a warning message displays if the total of the expenses exceeds the overall budget. However, click the OK button on the warning dialog box to save the budget detail. The system does not prevent you from overspending your budget.

Creating Initiative Actions

This section discusses how to:

- Create actions associated with an initiative.
- Add action information.

Pages Used to Create Initiative Actions

Page Name	Object Name	Navigation	Usage
Initiative Action	AV_INTV_ACTN	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Use, Initiative Actions, Initiative Action • Manage Contributor Relations, Manage Memberships, Use, Initiative Actions, Initiative Action • Manage Contributor Relations, Manage Volunteers, Use, Initiative Actions, Initiative Action • Manage Contributor Relations, Manage Events, Use, Initiative Actions, Initiative Action • Manage Contributor Relations, Manage Other Initiatives, Use, Initiative Actions, Initiative Action 	Create actions associated with an initiative.
Action Info (action information)	AV_INTV_ACTN2	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Use, Initiative Actions, Action Info • Manage Contributor Relations, Manage Memberships, Use, Initiative Actions, Action Info • Manage Contributor Relations, Manage Volunteers, Use, Initiative Actions, Action Info • Manage Contributor Relations, Manage Events, Use, Initiative Actions, Action Info • Manage Contributor Relations, Manage Other Initiatives, Use, Initiative Actions, Action Info 	Continue the process of adding actions associated with an initiative.

Using the Initiative Action Page

Access the Initiative Action page.

Initiative Action		Action Info	
Initiative:	SCHOLARSHIP Scholarship Campaign		Institution: PSUNV
Action Number:	25		
Action:	<input type="text" value="Appeal/"/>		
Planned Date:	<input type="text" value="09/19/2000"/>		Action Type: <input type="text"/>
Expiration Date:	<input type="text"/>		Contact Type: <input type="text"/>
Complete Date:	<input type="text"/>	*Status:	<input type="text" value="Scheduled"/>
Description:	<input type="text"/>		
Responsible Person:	<input type="text" value="Staff"/>	<input type="text" value="AV0027"/>	Boudreaux,Lisele
Initiative Responsible Person:	Carroll,Bruce		

Initiative Action page

Action	Describe the action, using up to 30 characters.
Action Type	Select a classification for the action. Actions are typically things such as <i>Design Session</i> , <i>Hire Contractor</i> , and so on. Action types are defined on the Action Types page.
Expiration Date	(Optional) Enter the date on which the action is no longer valid, regardless of whether or not it is completed. If the action is not completed by the expiration date, it no longer appears on the To Do List after the expiration date.
Contact Type	Determine whether the action is made through a <i>telephone call</i> , <i>letter</i> , <i>email</i> , <i>personal visit</i> , and so on. Contact types are defined by your institution.
Description	Describe the action, using up to 250 characters. Your description can include information about the purpose and goal of the action, and any other information needed to complete the action such as a contact phone number.
Responsible Person	Select the name and ID of the person overseeing the action.
Initiative Responsible Person	The person responsible for the initiative appears.

Adding Action Information

Access the Action Info page.

Initiative Action | Action Info

Initiative: SCHOLARSHIP Scholarship Campaign **Institution:** PSUNV

Action: Appeal/ **Action Type:**

Action for Other Initiatives View All First 1 of 1 Last

Initiative Type	Initiative
<input type="text"/>	<input type="text"/>

Others Assigned View All First 1 of 1 Last

Type	Resource Assigned	Role
<input type="text"/>	<input type="text"/>	<input type="text"/>

Complete Date: **Result Code:**

Action Info page

Initiative Type and Initiative

Select these to add this action to the To Do List for another initiative.

Type, Resource Assigned, and Role

Select the resource type, resource ID, and role.

Type values are delivered with your system as translate values. Do not modify these translate values in any way. Any modifications to these values will require a substantial programming effort.

Result Code

When the action status has been changed to *Complete*, select the appropriate result code. Action result codes are defined by your institution.

Viewing Action Summary Information

This section discusses how to:

- View initiative actions on your To Do list.
- View initiative action summary information.
- View action details.
- View other initiatives and others assigned to an action.

Pages Used to View Action Summary Information

Page Name	Object Name	Navigation	Usage
Initiative Action Summary	AV_INTV_ACTN_SMRY	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Inquire, Action Summary, Action Summary • Manage Contributor Relations, Manage Memberships, Inquire, Action Summary, Action Summary • Manage Contributor Relations, Manage Volunteers, Inquire, Action Summary, Action Summary • Manage Contributor Relations, Manage Events, Inquire, Action Summary, Action Summary • Manage Contributor Relations, Manage Other Initiatives, Inquire, Action Summary, Action Summary 	View information about the existing actions for an initiative at your institution.
Action Detail	AV_INTV_ACTN_SP	Click the Details link on the Action Summary page.	View additional information about an initiative action.
Other Initiatives/Others Assigned	AV_INTV_ACTN2_SP	Click the Intv/Rsrc Asgn button on the Initiative Action Summary page.	View additional information about related initiatives and those assigned to the action.

Viewing Your To Do List

Use the Staff, Volunteer, and Unit To Do List pages to view lists of all the initiative actions a resource is responsible for during a particular time frame or for a particular designee.

See [Chapter 14, “Managing Prospects,” Viewing Your To Do List, page 244.](#)

Viewing Initiative Action Summary Information

Click the Details link to access detailed information about a particular initiative action on the Action Detail page.

Viewing Action Details

Click the Edit Action button to access the Initiative Action page where you can make changes to the existing action. Click the Intv/Rsrc Asgn (initiative/resource assignments) button to view information about other initiatives linked to this action and about the resources at your institution that are assigned to the action.

Viewing Related Goals

This section discusses how to view goals related to an initiative.

Page Used to View Related Goals

Page Name	Object Name	Navigation	Usage
Related Goals	AV_INTV_CMPGN_R_G, AV_INTV_EVNT_R_G, AV_INTV_MEMBR_R_G, AV_INTV_VOL_R_G, AV_INTV_OTHR_R_G	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Inquire, Campaign Related Goals • Manage Contributor Relations, Manage Membership, Inquire, Membership Related Goals • Manage Contributor Relations, Manage Volunteers, Inquire, Volunteer Related Goals • Manage Contributor Relations, Manage Events, Inquire, Event Related Goals • Manage Contributor Relations, Manage Other Initiatives, Inquire, Other Related Goals 	View information about goals for initiatives related to the initiative you are working with.

Viewing Related Goal Information

Some related initiatives may not have a financial goal. They still display on this page.

Viewing Responsible Staff for Related Initiatives

This section discusses how to view staff members assigned to related initiatives.

Page Used to View Responsible Staff for Related Initiatives

Page Name	Object Name	Navigation	Usage
Related Rspn Prsn (related responsible person)	AV_INTV_CMPGN_R_S, AV_INTV_EVNT_R_S, AV_INTV_MEMBR_R_S, AV_INTV_VOL_R_S, AV_INTV_OTHR_R_S	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Inquire, Campaign Related Respn Person • Manage Contributor Relations, Manage Membership, Inquire, Membership Related Respn Person • Manage Contributor Relations, Manage Volunteers, Inquire, Volunteer Related Respn Prsn • Manage Contributor Relations, Manage Events, Inquire, Event Related Respn Person • Manage Contributor Relations, Manage Other Initiatives, Inquire, Other Related Respn Person 	View information about the staff members that are responsible for initiatives related to the current initiative.

Using Mass Change for Initiative and Membership Letters

This section provides overviews of mass change and the initiative and membership mass change templates, and also discusses how to:

- Select mass change criteria and defaults.
- Run mass change processes.

Note. You must set up communications in your system prior to working with mass change.

Understanding Mass Change

PeopleSoft Contributor Relations provides four mass change templates that enable you to generate communications for initiative audiences and membership organization members.

You can generate communications for audiences of a campaign appeal, membership campaign, volunteer program, event, and so on. When you create an initiative audience, you can run that audience through the mass change template and send a communication to those audience members who meet your selection criteria.

Or, you can select specific members of an organization based on their expiration date and send out renewal notices and membership cards. In addition, you can select recipients and mail benefits to those groups that have earned them.

Note. Templates for membership and initiative communications are shipped with your PeopleSoft Contributor Relations system. You can modify templates for your institution.

Understanding the Initiative Mass Change Template

There are two mass change definitions in the initiative mass change process – CR-Initiative1-Delete and CR-Initiative2-Insert3CEngine.

The two mass change definitions are described below:

1. *CR-Initiative1-Delete.* The first portion of this definition deletes temporary initiative records from the ADM_TMP_MC, ADM_TMP2_MC, and EVNT_SPDKEY_MC tables if OPRID is equal to the person who selected the records and MC_DEFN_ID is equal to CR-Initiative2-Insert3CEngine. This criterion prevents the membership and initiative mass change functions from deleting records belonging to the other function.
2. *CR-Initiative2-Insert3CEngine.* This definition joins the AV_INITIATIVE table with the PERSONAL_DATA table based on EMPLID. This step is done to find the DT_OF_DEATH value for each record. If a person has a date of death, a communication record is not created when joint letter generator is run. In addition, the ADDRESSES table is checked and communication records are written only for those people who have an address with an effective status of *Active*. The records resulting from this join are inserted into the ADM_TMP_MC table.

Next, data from the EVNT_COMM_MC_VW is copied to the EVNT_SPDKEY_MC temporary table. This view breaks out the Comm Speed Key data for each Comm Key defined on the Event Definition Setup page. There may be one or more Comm Keys associated with the Event ID selected, thus creating one or more communication records for each Event ID. The following fields are then updated on the EVNT_SPDKEY_MC table:

Field Name	Value taken from this field
COMPLETED_COMM	ACTIVITY_COMPLETED
COMPLETED_DT	COMM_DT
COMPLETED_ID	COMM_ID

Note. Before this step can take place, you must define letter codes, communication context including a method and direction, and categories. These key values are combined to create communication Event IDs. You must also set up communication 3C groups and 3C group security.

Finally, the EVNT_SPDKEY_MC and ADM_TMP_MC tables are copied and joined in ADM_TMP2_MC.

You can select criteria based on the following fields to target your audience. At a minimum, you must select criteria for key fields. PeopleSoft recommends that you narrow the criteria by using all the fields. This ensures that you identify the correct records.

Table	Field	Key
AV_INITIATIVE	INSTITUTION	
AV_INITIATIVE	AV_AUDIENCE	Yes
AV_INITIATIVE	AUD_TYPE	Yes
AV_INITIATIVE	INTV_CD	Yes
AV_INITIATIVE	START_DT	
AV_INITIATIVE	END_DT	
EVNT_3C_GRP_VW	EVENT_3CS_ID	

After the CR-Initiative2-Insert3CEngine step has run, run the 3C Engine and choose your options for processing joint records. This generates all communication records for processing by the letter generator.

Understanding the Membership Mass Change Template

There are two mass change definitions in the membership mass change process – CR-Membership1-Delete and CR-Membership2-Insert3CEngine.

The two mass change definitions are described below:

1. *CR-Membership1-Delete.* The first portion of this definition deletes temporary membership records from the ADM_TMP_MC, ADM_TMP2_MC, and EVNT_SPDKEY_MC tables if OPRID is equal to the person who selected the records and MC_DEFN_ID is equal to CR-Membership2-Insert3CEngine. This criterion prevents the membership and initiative mass change functions from deleting records belonging to the other function.
2. *CR-Membership2-Insert3CEngine.* This definition joins the AV_MEMBER7_VW table with the PERSONAL_DATA table based on EMPL_ID. This step is done to find the DT_OF_DEATH value for each record. If a person has a date of death, a communication record is not created when joint letter generator is run. In addition, the ADDRESSES table is checked and communication records are written only for those people who have an address with an effective status of *Active*. The records resulting from this join are inserted into the ADM_TMP_MC table.

Next, data from the EVNT_COMM_MC_VW table is copied to the EVNT_SPDKEY_MC temporary table. This view breaks out the Comm Speed Key data for each Comm Key defined on the Event Definition Setup page. There may be one or more Comm Keys associated with the Event ID selected, thus creating one or more communication records for each Event ID. The following fields are then updated on the EVNT_SPDKEY_MC table:

Field Name	Value taken from this field
COMPLETED_COMM	ACTIVITY_COMPLETED
COMPLETED_DT	COMM_DT
COMPLETED_ID	COMM_ID

Note. Before this step can take place, you must define letter codes, communication context including a method and direction, and categories. These key values are combined to create communication Event IDs. You must also set up communication 3C groups and 3C group security.

Finally, the EVNT_SPDKEY_MC and ADM_TMP_MC tables are copied and joined in ADM_TMP2_MC.

You can select criteria based on the following fields to target your audience. At a minimum, you must select criteria for key fields. PeopleSoft recommends that you narrow the criteria by using all the fields. This ensures that you identify the correct records.

Table	Field	Key
AV_MEMBERSHIP	INSTITUTION	Yes
AV_MEMBERSHIP	AV_MBR_ORG_COD	Yes
AV_MEMBERSHIP	AV_DUES_LVL	
AV_MEMBERSHIP	AV_MBRSH_TYP	
AV_MEMBERSHIP	START_DT	
AV_MEMBERSHIP	EXPIRATION_DT	
AV_MEMBERSHIP	MBR_TYPE	
AV_MEMBERSHIP	MOTIVATION_CD	
AV_MEMBERSHIP	SESSION_NO	
EVNT_3C_GRP_VW	EVENT_3CS_ID	

After the CR-Membership2-Insert3CEngine step has run, run the 3C Engine and choose your options for processing joint records. This generates all communication records for processing by the letter generator.

Pages Used to Run Mass Change Processes

Page Name	Object Name	Navigation	Usage
Criteria and Defaults	MC_DEFN_01	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Use, Mass Change Definition, Criteria and Defaults • Manage Contributor Relations, Manage Memberships, Use, Mass Change Definition, Criteria and Defaults • Manage Contributor Relations, Manage Volunteers, Use, Mass Change Definition, Criteria and Defaults • Manage Contributor Relations, Manage Events, Use, Mass Change Definition, Criteria and Defaults • Manage Contributor Relations, Manage Other Initiatives, Use, Mass Change Definition, Criteria and Defaults 	Specify the field criteria to use for selecting records from the database and identify which fields are populated and what values they contain by default. Also identify the Event ID required to generate the communication record.
Run Mass Change	RUN_MASSCHNG	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Campaigns, Process, Run Mass Change, Run Mass Change • Manage Contributor Relations, Manage Events, Process, Run Mass Change, Run Mass Change • Manage Contributor Relations, Manage Memberships, Process, Run Mass Change, Run Mass Change • Manage Contributor Relations, Manage Other Initiatives, Process, Run Mass Change, Run Mass Change • Manage Contributor Relations, Manage Volunteers, Process, Run Mass Change, Run Mass Change 	Execute mass change processes.

Selecting Criteria and Defaults

Access the Criteria and Defaults page.

Note. If you are running mass change for an initiative, select the CR-Initiative2-Insert3CEngine mass change definition. If you are running mass change for a membership organization, select the CR-Membership2-Insert3CEngine mass change definition.

DescriptionStudent AdministrationCriteria and DefaultsGenerate SQLExecution History

Mass Change Definition:CR-Initiative2-Insert 3CEngine

SQL Statement

First1 of 4Last

Execution Seq:1Description:Select recs/Insr into Tmp Tbl

Criteria

First1-2 of 6Last

Field	Field Value	
Audience Type Equal To	S	+ -
Audience Code Equal To	ALUM - ALL	+ -

Defaults

First1 of 1Last

Field Label	Mass Change Field Value	
1		+ -

Criteria and Defaults page

- Criteria

Set criteria values using SQL operators and values. For example, to select an audience type of Segmentation, you would choose *Equal To* and enter a field value of *S*.

You must have a thorough understanding of your data and dependencies before selecting criteria. Many codes are not intuitive, and many fields are dependent upon others. For example, a dues level must be related to a specific member organization, but the prompts are not hierarchical.
- Field

You can enter only one SQL operator per criteria. However, if you select a criteria option such as *In*, you can list multiple values by placing your cursor in the Field Value field and inserting rows.

Note. Do not run the mass change process from within this component. Run the process using the Run Mass Change page.

Running Mass Change

Access the Run Mass Change page.

Run Mass Change

Run Control ID: PS [Report Manager](#) [Process Monitor](#) Run

Mass Change Run Type

☒ Execute Single Mass Change
 ☐ Download File Preparation

☐ Execute Mass Change Group
 ☐ Download Table to a File

☐ UpLoad File Preparation
 ☐ Upload File to Table

Execution Parameters

Mass Change Definition:

Mass Change Group ID:

Download/Upload Data File:

MASSLAYO.SQC To Be Updated:

Run Mass Change page

Mass Change Run Type

Execute Single Mass Change

To run each mass change definition individually, select *Execute Single Mass Change*.

If you select this option, you must run each of the four mass change definitions in the process separately.

Execute Mass Change Group

To run more than one mass change definition at one time, select *Execute Mass Change Group* as the mass change run type.

If you select *Execute Mass Change Group* and you are running mass change for an initiative, run AV-Initiative-Step1 followed by AV-Initiative-Step2.

If you select *Execute Mass Change Group* and you are running mass change for a membership organization, run AV-Membership-Step1 followed by AV-Membership-Step2.

Note. You can verify your data by running an SQL statement against the temporary table or the communication table.

Mass Change Definition

Enter the name of the mass change definition to run.

Note. The remaining fields on this page are not used in PeopleSoft Contributor Relations.

Once the Mass Change process is run, data is written to the communications record.

CHAPTER 17

Managing Campaigns

This chapter gives an overview of campaign management, lists prerequisites, and describes how to:

- Manage general initiative information.
- Set campaign initiative goals.
- View prospect lists.
- Generate campaign progress reports.
- View top donors to a campaign.
- View campaign initiative summary information.

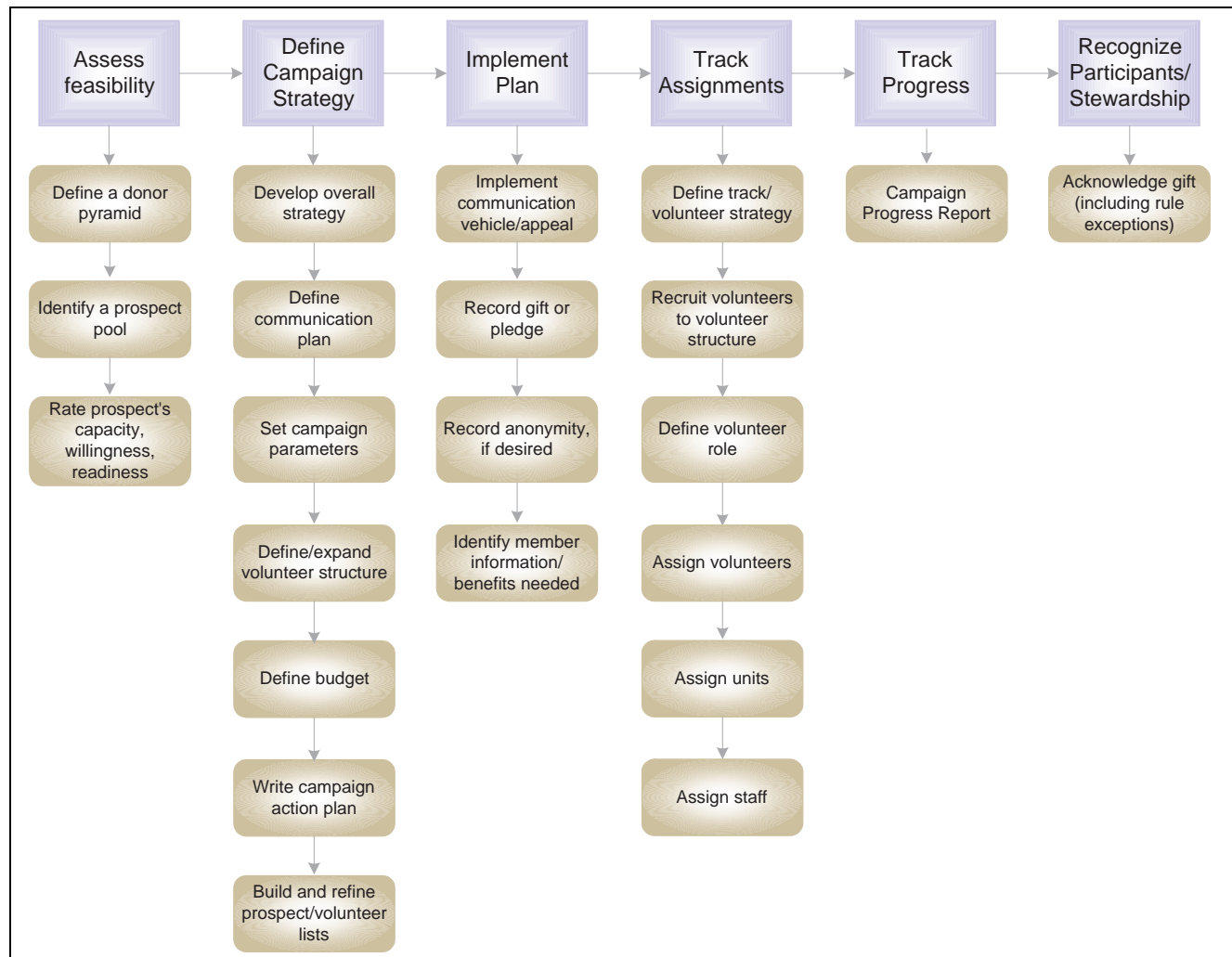
See Also

Chapter 7, “Setting Up Campaigns,” page 87

Understanding Campaign Management

A campaign is an organized institutional effort targeted to a specific constituency that occurs over a specified period of time with specific purposes and goals. Campaigns can be annual or multi-year. Many campaigns start in a silent, non-public phase that serves to identify the pace-setting gifts that form the nucleus fund of the campaign. Once the momentum is created from this private phase, the campaign is taken public to complete the goals of the campaign. As a campaign moves through its strategic plan, you can track progress in its entirety and through annual, unit, and department goals.

The following diagram gives an overview of the PeopleSoft Contributor Relations features that assist your institution with its campaign management processes.



Contributor Relations campaign management features

A campaign is one type of initiative in PeopleSoft Contributor Relations. All initiative types share some common management pages. Some initiatives, such as campaigns, require additional management that is specific to their purpose. The campaign-specific management is covered in this chapter; refer to the chapter below for information about managing all types of initiatives.

See Also

[Chapter 16, “Managing Initiatives,” page 269](#)

Prerequisites

Before you can manage a campaign, you must have one set up. There are common initiative setup pages for this task, and also campaign-specific setup pages that enable you to complete campaign setup.

See [Chapter 6, “Setting Up Initiatives,” page 67](#) and [Chapter 7, “Setting Up Campaigns,” page 87](#).

Managing General Initiative Information

You manage campaigns in PeopleSoft Contributor Relations by using the common initiative functionality found throughout the system. Initiatives are the common link between campaigns, events, volunteer efforts, and membership initiatives at your institution.

In order to manage a campaign, a campaign initiative must exist for each new campaign at your institution. Use the Campaign Initiative component to begin the process of defining a new campaign at your institution. When you create a campaign initiative, you also create, its audience, resources, any related initiatives, and a public relations plan. You can then use this chapter to manage the remaining campaign-specific functionality.

See [Chapter 16, “Managing Initiatives,” page 269](#).

Setting Campaign Initiative Goals

Many campaign initiatives at your institution might have intermediate goals or milestones in addition to an overall goal. This section discusses how to:

- Set intermediate goals.
- Set annual goals.
- Set unit goals.
- Set department goals.

Pages Used to Set Campaign Initiative Goals

Page Name	Object Name	Navigation	Usage
Initiative Goals	AV_INTV_CMPGN_GOAL	Manage Contributor Relations, Manage Campaigns, Use, Campaign Goals, Initiative Goals	Set intermediate goals or milestone for an initiative.
Annual Goals	AV_CMPGN_ANNUAL	Manage Contributor Relations, Manage Campaigns, Use, Campaign Goals, Annual Goals	Set goals for each year of the campaign cycle.
Department Goals	AV_CMPGN_DEPT_GOAL	Manage Contributor Relations, Manage Campaigns, Use, Campaign Goals, Department Goals	Set campaign goals for specific departments at your institution.
Unit Goals	AV_CMPGN_UNIT_GOAL	Manage Contributor Relations, Manage Campaigns, Use, Campaign Goals, Unit Goals	Set campaign goals for units that you have defined.

Setting Intermediate Goals for Campaigns

Access the Initiative Goals page. This page enables you to break down the initiative's overall goal into measurable milestones, to be used in custom reports.

The screenshot shows the 'Initiative Goals' page with tabs for Initiative Goals, Annual Goals, Department Goals, and Unit Goals. The 'Initiative Goals' tab is active. Campaign details include: Campaign: ANNFUND, Annual Fund Campaign; Institution: PSUNV; Financial Goal: 5,000,000.00 USD; % Participtn Goal: 35.00.

The 'Intermediate Goals/Milestones' section features a table with the following columns: *Target Date, *Goal Type, Pers/Org, Audience Code, and Amount/Pct/Total. The first row contains the values: 07/23/2001, Number Donors, Pers, and an empty Audience Code and Amount/Pct/Total field. Navigation links (View All, First, 1 of 1, Last) and add/delete buttons (+, -) are also visible.

*Target Date	*Goal Type	Pers/Org	Audience Code	Amount/Pct/Total
07/23/2001	Number Donors	Pers		

Initiative Goals page

Upon entering this page the Campaign name, Financial Goal, and % Participation Goal for the initiative appear. Values for these fields are based on the values entered in the Campaign Initiatives component.

- Target Date** Select the target date or date by which the goal might be reached.
- Goal Type** Select the goal type or the measurement by which you track the goal's progress. Valid goal types are *% Income*, *Financial*, *% Participation*, *Number of Donors*, and *Number of Volunteers*. Your institution can define additional goal types.
- Audience Code** Select the audience code the goal pertains to. Only those populations defined by your institution with the type of *Segmentation* for this initiative on the Audience page are available. That signifies that they are part of a target audience for some kind of ask, such as an invitation or event.

Setting Annual Goals

Access the Annual Goals page.

Initiative Goals | **Annual Goals** | **Department Goals** | **Unit Goals**

Campaign: ANNFUND Annual Fund Campaign **Institution:** PSUNV

Financial Goal: 5,000,000.00 USD **Length of Campaign:** 1year/0month

View All First 1 of 1 Last

Campaign Year: 1

View All First 1 of 1 Last

***Effective Date:** 07/01/1998

Dollar Goal: 1000000 **Nbr Donors Goal:** 5000

Avg Gift Goal: 1000 **Nbr Vol Goal:** 35

Pct Increase: 25 **Nbr Prspct Goal:** 3000

View All First 1 of 1 Last

*Constituent Type	Goal Amount	Nbr Donors
Alumni	500000	4000

Save Return to Search Previous tab Next tab Update/Display Include History Correct History

[Initiative Goals](#) | [Annual Goals](#) | [Department Goals](#) | [Unit Goals](#)

Annual Goals page

Campaigns can be one-year or multi-year efforts. When the start and end dates are saved for a campaign, the system creates an annual goals record for each year of the campaign. If the campaign dates change, the annual goals records change accordingly. For example, if a campaign is extended, additional annual goals records are created. If it is shortened, the number of annual goals records is reduced to the new shorter campaign period. However, the annual goals that have been entered are not redistributed over the new campaign period. They must be adjusted manually.

Goals should be set at the beginning of the campaign and should rarely change. The goals set here can be used in custom reports.

Campaign Year	Displays the year of the campaign as defined by the length of the campaign. For example, if this campaign lasts three years, then there should be annual goals for each year, and thus, three campaign years.
Dollar Goal	Enter the monetary portion of the overall goal that you expect to receive during this campaign year.
Avg Gift Goal (average gift goal)	Enter the expected gift when averaged out over all donors for this campaign year.
Pct Increase (percentage increase)	Enter the increase in overall giving from one year to the next.
Nbr Donors Goal (number of donors goal)	Enter the anticipated number of donors for this campaign year.
Nbr Vol Goal (number of volunteers goal)	Enter the anticipated number of volunteers who will be involved with the campaign during this goal year.

- Nbr Prspct Goal** (number of prospects goal)

Enter the anticipated number of prospects who will be available for contact during the campaign year.
- Goal Amount**

Enter the amount to receive from constituents who share a particular constituent type.

Goals can be set by constituent type for each campaign year.
- Nbr Donors** (number of donors)

Enter the number of donors who share a particular constituent type from which to receive campaign contributions.

Setting Department Goals

Access the Department Goals page.

Initiative GoalsAnnual GoalsDepartment GoalsUnit Goals

Campaign:ANNFUNDAnnual Fund CampaignInstitution:PSUNV

Financial Goal:5,000,000.00 USDLength of Campaign:1year/0month

View AllFirst1 of 1Last

Campaign Year:1

View AllFirst1 of 1Last

*Effective Date:07/01/1998

View AllFirst1 of 1Last

*DepartmentGoal Amount

SaveReturn to SearchPrevious tabNext tab

Update/DisplayInclude HistoryCorrect History

[Initiative Goals](#) | [Annual Goals](#) | [Department Goals](#) | [Unit Goals](#)

Department Goals page

Departments at your institution can be assigned a total dollar amount that is their goal amount to raise for each campaign year.

Department

Select the department responsible for the campaign goal. This prompt box contains a listing of all the departments associated with the setID for the business unit that you select for this initiative.

Goal Amount

Enter the portion of the overall campaign goal your institution expects to receive through giving to the specific department during this campaign year.

Setting Unit Goals

Access the Unit Goals page.

306

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Initiative Goals Annual Goals Department Goals **Unit Goals**

Campaign: ANNFUND Annual Fund Campaign **Institution:** PSUNV

Financial Goal: 5,000,000.00 USD **Length of Campaign:** 1year/0month

View All First 1 of 1 Last

Campaign Year: 1

View All First 1 of 1 Last

***Effective Date:** 07/01/1998

View All First 1 of 1 Last

***Unit Code** **Goal Amount**

Save Return to Search Previous tab Next tab Update/Display Include History Correct History

[Initiative Goals](#) | [Annual Goals](#) | [Department Goals](#) | [Unit Goals](#)

Unit Goals page

Units are assigned by the institution. Like departments, they can be assigned a total dollar amount that is their goal to raise for the campaign year. However, units differ from departments in that they are information structures outside the formal department structure of your institution. An example might be a section of the department that might have specific goals for this campaign year such as a journalism lectureship that resides within the Communications department.

Unit Code Select a unit code from the available options.

Goal Amount Enter the portion of the overall campaign goal your institution expects to receive through giving to the unit that you selected for this campaign year.

Viewing a Prospect List

This section discusses how to view a prospect list.

Pages Used to View a Prospect List

Page Name	Object Name	Navigation	Usage
Prospect List	AV_CMPGN_PROSPECTS	Manage Contributor Relations, Manage Campaigns, Inquire, Prospect List, Prospect List	View a list of the constituents who are linked to a campaign as a prospect. Each prospect is listed on this page only once, even though he or she can be linked to the campaign through more than one action or strategy.
Prospect Detail	AV_ACTN_SMRY_SP	Click the Details link on the Prospect List page.	View additional information about a prospect's outstanding and completed asks.

Viewing Prospects

This page is useful to view prospect asks, both outstanding and completed.

You can build a workset from the prospects listed on this page.

See Also

[Chapter 3, "General Functions Used Throughout the System," Building a Workset From a Page in the System, page 39](#)

Generating the Campaign Progress Report

This section discusses how to generate campaign progress reports.

Page Used to Generate Campaign Progress Reports

Page Name	Object Name	Navigation	Usage
Campaign Progress Report	AV_RUNCTL_CAMPR	Manage Contributor Relations, Manage Campaigns, Report, Campaign Progress Report, Campaign Progress Report	Generate the Campaign Progress report for a specific institution and campaign.

Generating Campaign Progress Reports

The Campaign Progress report summarizes the progress of a campaign in relation to its goals. The report includes information about the financial goal, current gifts, deferred gifts, and so on. If you choose to include related campaigns in the report, a campaign summary is generated that totals the progress for the campaign and its related campaigns of a lower reporting level together.

Access the Campaign Progress Report page.

Campaign Progress Report page

- Institution** Select the institution for which to generate a report.
- Campaign** Select the campaign for which to view progress. Campaigns are broad fundraising efforts at your institution.
- Include Related Campaigns** Select to include campaigns related to the campaign that you selected in the report. Any campaigns of a lower reporting level that you related to this campaign on the Related Initiatives page is included as a separate page in the report. The system also generates a summary of campaign progress that rolls up totals from all related campaigns.
- Example:* the Campaign 2001 is a level 1 campaign. Related to the Campaign 2001 are level 2 campaign Athletic Facilities and level 2 campaign Library Endowment.
- If you select the Include Other Campaign check box, the Campaign Progress report generates four pages. The first three pages are individual progress reports for each campaign, and the final is a summary page including combined totals for all three campaigns.

When you click the Run button, Process Scheduler runs the AVCAMPRO process at user-defined intervals.

See Also

[Appendix A, “PeopleSoft Contributor Relations Reports,” PeopleSoft Contributor Relations Reports: Selected Reports, page 575](#)

Viewing the Top Donors to a Campaign

This section discusses how to view a summary of the top donors assigned to a campaign.

Page Used to View Top Donors

Page Name	Object Name	Navigation	Usage
Top Donors	AV_CMPGN_TTG_LIST	Manage Contributor Relations, Manage Campaigns, Inquire, Top Ten Commitments, Top Donors	View summary information about the top donors to a campaign.

Viewing Top Donor Summaries

This page contains ID, Name, Commitment Amt (amount), Constituent Type, and information about whether they pledged the amount or gave it as a gift. You can view up to 25 donors on this page.

You can also build a workset from the donors listed on this page. You might want to create a workset from this donor list that you could then target the next time for something similar.

See Also

Chapter 3, “General Functions Used Throughout the System,” Building a Workset From a Page in the System, page 39

Viewing a Summary of Campaign Initiatives

This section discusses how to view summaries of campaign initiatives.

Pages Used to View a Summary of Campaign Initiatives

Page Name	Object Name	Navigation	Usage
Campaign Summary	AV_CMPGN_SUMMARY	Manage Contributor Relations, Manage Campaigns, Inquire, Campaign Summary, Campaign Summary	View a summary of all the campaigns at your institution.
Initiative Detail	AV_INTV_DTL_SP	Click the Details link on the Campaign Summary page.	Access additional information about an initiative.

Using the Campaign Summary Page

You can choose to view only active campaigns, past campaigns, or both.

Select an institution for which you want to view campaigns and the time frame to view. The list of campaigns provides summary information such as the campaign’s financial goal, actual amount collected, start and end dates, and number of donors and prospects.

Details

Click this link to access the Initiative Detail Page, which displays detailed information about the campaign.

See Also

Chapter 16, “Managing Initiatives,” Defining an Initiative, page 270

Using the Initiative Detail Page

Access the Initiative Detail page.

Initiative Detail

Initiative:	AF2002	Annual Fund Campaign, 2002	Institution:	PSUNV
--------------------	--------	----------------------------	---------------------	-------

Start Date:	07/01/2001	End Date:	06/30/2002	Status:	Active
Financial Goal:	500,000.00	USD	Phase:	Public	
Description:	Annual Fund campaign from 7/1/01 thru 6/30/02.				

Responsible Person

View All First 1 of 1 Last

Person:	AV0023	Gilbert, Anne	Eff Date:	02/01/2001
----------------	--------	---------------	------------------	------------

Responsible Manager

View All First 1 of 1 Last

Rspl Manager:	
----------------------	--

Responsible Department

View All First 1 of 1 Last

Department	Start Date	End Date

☐ Sub-Goals Defined
 ☐ Audience Defined
 ☐ Resources Defined
 ☐ Related CMP Intv
 ☐ Related MBR Intv
 ☐ Related VOL Intv
 ☐ Related EVT Intv
 ☐ Related OTH Intv

Initiative Detail page

Sub-Goals Defined	Indicates that sub-goals have been defined for this initiative.
Audience Defined	Indicates that an audience has been defined for this initiative on the Audience page.
Resources Defined	Indicates that resources have been assigned to this initiative on the Resources page.
Related CMP Intv (related campaign initiative)	Indicates that a campaign initiative has been linked to this initiative on the Related Initiatives page.
Related MBR Intv (related member initiative)	Indicates that a membership initiative has been linked to this initiative on the Related Initiatives page.
Related VOL Intv (related volunteer initiative)	Indicates that a volunteer initiative has been linked to this initiative on the Related Initiatives page.

Related EVT Intv (related event initiative)

Indicates that an event initiative has been linked to this initiative on the Related Initiatives page.

Related OTH Intv (related other initiative)

Indicates that an initiative with the type of other has been linked to this initiative on the Related Initiatives page.

CHAPTER 18

Managing Membership

This chapter gives an overview of membership, lists prerequisites and common elements, and also describes how to:

- Manage general initiative information.
- Create a member organization.
- Build and merge the membership list.
- Define membership initiative goals.
- Enter member dues.
- Process membership credit card transactions.
- Adjust membership dues payments.
- Prepare for membership letters.
- View membership progress.
- View membership history.
- View membership benefit history.
- View membership summary or a supervisor's membership summary.
- View self-service membership history.

See Also

Chapter 8, "Setting Up Membership Initiatives," page 95

Understanding Membership

In order to involve the greatest number of constituents in the activities of an institution, it is often beneficial to create a membership organization that focuses on a particular interest area or support area. A member organization can be an alumni association, a chapter of a larger umbrella organization, or an organized group based on one or more common characteristics as defined by your institution. Member organizations may have a parent organization or child organizations.

Member organizations may or may not require a payment of dues to establish membership. Some organizations will have a membership year that resets the membership at the beginning of a particular month each year. Some organizations have membership based strictly on the existence of a particular attribute on a record. These organization membership rosters are created through an automated process that links the constituent to the membership organization because the attribute exists. Dues and complimentary memberships are entered manually through membership entry.

If dues are collected upon membership in an organization, they can be allocated to one or more designations, and a joint membership can be given to one or more people or organizations.

Membership is one type of initiative in PeopleSoft Contributor Relations. All initiative types share some common management pages. Some initiatives, such as membership initiatives, require additional management that is specific to their purpose. The membership-specific management is covered in this chapter; refer to the chapter below for information about managing all types of initiatives

See Also

Chapter 16, “Managing Initiatives,” Understanding Initiatives, page 269

Prerequisites

Before you can manage a membership initiative, you must have one set up. There are common initiative setup pages for this task, and also membership-specific setup pages that enable you to complete setup.

See Chapter 6, “Setting Up Initiatives,” page 67 and Chapter 8, “Setting Up Membership Initiatives,” page 95.

Common Elements Used in This Chapter

ID Type	Identify the constituent as a <i>Person</i> or an <i>Organization</i> .
ID/Org ID	Enter the ID of the constituent (either a person or an organization) or the person assigned to a task.
Add Mbr (add member)	<p>If adding memberships, click to access the Membership Entry page, where you can add another membership payment or complimentary membership in the session.</p> <p>If adjusting memberships, click to access the Membership Adjustment Summary page, where you can select another membership payment number for adjustment.</p>
Add Desig (add designation)	If your institution allows the entry of additional gifts in a membership session, click to add an additional row for designation information.

Managing General Initiative Information

You manage membership initiatives in PeopleSoft Contributor Relations by using the common initiative functionality found throughout the system. Initiatives are the common link between campaigns, events, volunteer efforts, and membership initiatives at your institution.

In order to manage a membership effort, a membership initiative must exist for each new effort at your institution. That means that you have defined the basic features of the initiative. Optionally, you can also set up its audience, resources, any related initiatives, and a public relations plan. You can then use this chapter to manage the remaining membership-specific functionality.

See [Chapter 16, “Managing Initiatives,” page 269](#).

Creating a Member Organization

This section discusses how to:

- Define the member organization.
- Set member criteria.
- Define membership objectives.
- Define membership dues.
- Assign membership resources.

Understanding Member Organizations

A member organization can be an alumni association, a chapter of a larger umbrella organization, or an organized group based on one or more common characteristics as defined by your institution. It can have a parent organization.

Member organizations may or may not require a payment of dues to establish membership. Some organizations have a membership year that resets the membership at the beginning of a particular month each year.

In other cases membership can be based strictly on the existence of a particular attribute on a constituent's record. In this instance organization membership rosters are generated through an automated process that links the qualifying constituents to the member organization.

Pages Used to Create a Member Organization

Page Name	Object Name	Navigation	Usage
Member Organization	AV_MBR_ORG	Manage Contributor Relations, Manage Memberships, Use, Member Organization, Member Organization	Begin the process of defining a member organization at your institution.
Member Criteria	AV_MBR_CRIT	Manage Contributor Relations, Manage Memberships, Use, Member Organization, Member Criteria	Specify the audiences that qualify for membership in a member organization if dues are not required.
Member Objectives	AV_MBR_OBJ	Manage Contributor Relations, Manage Memberships, Use, Member Organization, Member Objectives	Define the aims of the member organization in terms of advancing your institution.
Member Dues	AV_MBR_DUES	Manage Contributor Relations, Manage Memberships, Use, Member Organization, Member Dues	Define the dues, levels, designations, and benefits for member organizations that require payment of dues.
Member Resources	AV_MBR_RESOURCES	Manage Contributor Relations, Manage Memberships, Use, Member Organization, Member Resources	Add information about any additional resources assigned to a member organization, other than the responsible person.

Defining the Member Organization

Access the Member Organization page.

Member Organization
Member Criteria
Member Objectives
Member Dues
Member Resources

Business Unit: PSUNV
Mbr Org: ALUMASSN
Institution: PSUNV

Mbr Org Name: Alumni Association
Mission: Involve alumni
Start Date: 01/01/1900
End Date:
Campus: MAIN Main Hacienda Campus
Reporting Level: 1
*Club Classification: Alumni Association
*Charter Status: Approved

Responsible Person
View All
First
1 of 1
Last

*ID
AV0023
Gilbert, Anne

☐ Allow Comp Memberships
☒ Membership Dues Required
☐ Membership Resets Each Year
Month: January

Member Organization page

Mbr Org Name (member organization name)	Enter the formal name of the organization, up to 60 characters.
Mission	Enter the member organization's mission, which describes the history and purpose of the member organization. This is a free-form text field.
Reporting Level	Select the member organization's reporting level. The highest level is <i>1</i> . A level 1 member organization cannot be related to another level 1 member organization.
Club Classification	Identify the member organization as a <i>chapter</i> , <i>alumni association</i> , <i>constituent society</i> , or other classification. Your institution can define club classifications in the translate table record.
Charter Status	Indicate whether the club has been approved as a full chartered member organization for your institution.
Allow Comp Memberships (allow complimentary memberships)	<p>Select to enable the ability to grant constituents complimentary membership in this member organization. In some cases, you may add constituents as a member of an organization although they do not meet the audience criteria for membership or they are not expected to pay membership dues. For example, a constituent may be a very active volunteer and you want to give him or her a complimentary Association membership.</p> <p>If selected, a complimentary check box displays on the Membership Entry page when you add a membership transaction for this member organization. When entering the membership transaction, you have the option of granting a complimentary membership.</p>
Membership Dues Required	Select to require dues prior to a constituent's membership in the organization. If selected, at least one dues level on the Member Dues page must be completed for the member organization before the record can be saved. If cleared, you must select criteria on the Member Criteria page to build membership based on audiences.
Membership Resets Each Year	Select if annual membership in the organization is based on a set calendar beginning the same month each year.
Month	Select the month when the new membership year begins. This field populates by default to the first month in the business unit's calendar definition. If you select the Membership Resets Each Year check box, this field is required. If not, this field is inactive.

Setting Member Criteria

Access the Member Criteria page.

Member Organization		Member Criteria	Member Objectives	Member Dues	Member Resources																				
Business Unit: MEDBU		Institution: PSUNV																							
Mbr Org: ITALIAN		Italian Cooking Enhancement Program																							
<div>Criteria View All First 1-4 of 4 Last</div> <table border="1"> <thead> <tr> <th>*Pers/Org</th> <th>Audience</th> <th>Description</th> <th></th> </tr> </thead> <tbody> <tr> <td>Organization</td> <td>POLITICAL</td> <td>Politically Involved Organizations</td> <td>Audience Detail + -</td> </tr> <tr> <td>Person</td> <td>ALUMNI</td> <td>Alumni - Graduates</td> <td>Audience Detail + -</td> </tr> <tr> <td>Person</td> <td>ETHNICITY</td> <td>African Americans from the Class of 1990</td> <td>Audience Detail + -</td> </tr> <tr> <td>Person</td> <td>INDIVIDUAL</td> <td>Individual People</td> <td>Audience Detail + -</td> </tr> </tbody> </table>						*Pers/Org	Audience	Description		Organization	POLITICAL	Politically Involved Organizations	Audience Detail + -	Person	ALUMNI	Alumni - Graduates	Audience Detail + -	Person	ETHNICITY	African Americans from the Class of 1990	Audience Detail + -	Person	INDIVIDUAL	Individual People	Audience Detail + -
*Pers/Org	Audience	Description																							
Organization	POLITICAL	Politically Involved Organizations	Audience Detail + -																						
Person	ALUMNI	Alumni - Graduates	Audience Detail + -																						
Person	ETHNICITY	African Americans from the Class of 1990	Audience Detail + -																						
Person	INDIVIDUAL	Individual People	Audience Detail + -																						

Member Criteria page

This page must be completed if membership is based on attributes that exist on a constituent's record. You cannot enter data on this page if the Membership Dues Required flag has been turned on for a member organization.

After specifying member criteria, you can automatically generate memberships by running the membership build and merge processes after this page is saved.

Audience Detail Click to view the selection criteria that has been defined for the audience code you selected on the Audience Detail page.

See Also

Chapter 6, "Setting Up Initiatives," Entering Audience Criteria, page 74

Defining Membership Objectives

Access the Member Objectives page.

Member Organization		Member Criteria		Member Objectives		Member Dues		Member Resources	
Business Unit: MEDBU				Institution: PSUNV					
Mr Org: ITALIAN		Italian Cooking Enhancement Program							
Mission:		To raise funds for Italian Cooking Dept							
Objectives View All First ◀ 1 of 1 ▶ Last									
Objective:		To encourage 200 more students to cook Italian dishes + -							
*Start Date:		01/01/2000		End Date:		12/31/2001			
*Goal Type:		ATTN		Attendance		Amount/Pct/Total:		200	

Member Objectives page

A member organization can have one or more objectives spanning various date ranges. These fields are intended to be used in customized reports.

Objective Enter a stated intent to accomplish something in the name of the member organization for your institution. Objectives can be up to 60 characters.

Defining Membership Dues

Access the Member Dues page.

This page must have a row entered if the Membership Dues required flag is checked. You cannot enter data here if it is not; use the Member Criteria page instead.

Member Organization				Member Criteria		Member Objectives		Member Dues		Member Resources	
Business Unit: MEDBU				Institution: PSUNV							
Mbr Org: ITALIAN				Italian Cooking Enhancement Program							
Dues Detail View All First 1 of 1 Last											
*Dues Level	*Description	*Membership Type	*Mbrshp Category								
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>								
Dues Amount View All First 1 of 1 Last											
*Effective Date:	<input type="text" value="11/16/2000"/>	*Status:	<input type="text" value="Active"/>								
*Total Amount:	<input type="text"/>	USD	*Duration:	<input type="text" value="12"/>							
*Payment Amount:	<input type="text"/>	*Payment Years:	<input type="text" value="1"/>								
Dues Designation View All First 1 of 1 Last											
*BU	*Designation	*Initiative	*Designation Amt	Gift							
<input type="text" value="MEDBU"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>							
Dues Benefits View All First 1 of 1 Last											
Standard Benefit	Item Value	1st									
<input type="text"/>	0.00	<input type="checkbox"/>									

Member Dues page

Dues Level and Description Enter the dues level and a longer, more informative Description.

Membership Type Indicate whether dues are *annual*, *sustaining*, *life member* or some other value defined by your institution. *Life* is a delivered value and should not be deleted. Use *Life* to designate any lifetime (non-expiring) membership.

The values that display in the prompt box depend upon the values you set up for on the Membership Type page for the setID associated with the business unit for this member organization.

Mbrshp Category
(membership category) Indicate whether the dues apply to a *family*, *single person*, *couple*, or other value defined by your institution on the Membership page. The value you indicate here appears during membership entry when a member organization is selected and a dues level is set.

The values that display in the prompt box depend upon the values you set up on the Membership Category page for the setID associated with the business unit for this member organization.

Total Amount Enter the amount that the member must pay to be recognized at this dues level.

Duration Enter the duration of the membership when purchased for this amount. This field populates by default to *12 Months*. If the membership type is *Life Member*, duration is ignored on the Membership Entry page.

Payment Amount and Payment Years If the member can purchase a membership and pay for it in installments over time such as an installment life membership, enter the amount for each payment and the number of years required to reach the membership dues balance.

BU (business unit)	<p>Select the business unit to which the membership dues should be allocated. This prompt box contains a list of all the valid business units at your institution. When you make a selection, the values in the Designation prompt box change to display the values you defined for the setID associated with this business unit.</p> <hr/> <p>Note. If you have already selected a designation and then change the business unit, your selections are backed out.</p> <hr/>
Designation	<p>Select the funds at your institution to which memberships and donations can be allocated.</p> <p>The values that display in the prompt box include the designations you defined for the setID associated with the business unit you select on each row.</p>
Initiative	<p>Select the membership or campaign initiative to which you want to assign member dues.</p>
Designation Amt (designation amount)	<p>Enter the amount or portion of the dues payment to be allocated to each designation.</p>
Gift	<p>When a portion of the dues is also a charitable contribution, select the designation receiving the contribution.</p> <p>When a membership is entered at a dues level where the gift box has been checked, the member's giving records are updated with the portion of the dues that has been identified here as a charitable contribution.</p> <hr/> <p>Important! You must allocate exact portions of gift and non-gift monies of the total dues amount.</p> <hr/>
Standard Benefit and Item Value	<p>Select any specific benefits of membership. For example, if a member receives a lapel pin upon joining the alumni association at the life member level, indicate that here. When you select a standard benefit, its monetary item value displays. When a membership is entered that has benefits defined here, the member's benefits summary is updated.</p> <p>The values that display in the prompt box depend upon the values you set up for the setID associated with the business unit for this member organization. Items are defined using the Donor Appreciation Detail page.</p>
1st	<p>Select if a benefit is only to be distributed to a member once. This indicates that when the member renews membership at the same level, he or she will not receive the same benefit again.</p>

Assigning Membership Resources

Access the Member Resources page.

Member Organization		Member Criteria		Member Objectives		Member Dues		Member Resources	
Business Unit: MEDBU				Institution: PSUNV					
Mbr Org: ITALIAN		Italian Cooking Enhancement Program							
Responsible Person View All First 1 of 1 Last									
Responsible Mgr: AV0022		Capozzelli, Mario						+ -	
Start Date: 01/01/2000				End Date: 12/31/2001					
Responsible Department View All First 1 of 1 Last									
*Department: ART/SCULPT		Art and Sculpture						+ -	
Start Date: 01/01/2000				End Date: 12/31/2001					
Responsible Unit View All First 1 of 1 Last									
*Unit: CARSVCS		Career Services						+ -	
Start Date: 01/01/2000				End Date: 12/31/2001					
Rsrc Type		Mbr Org Code		Vol Structure:					
Mbr Org		FRENCH				New Vol			

Member Resources page

Responsible Mgr
(responsible manager)

Select the person above the responsible person who receives customized reports and notifications related to the member organization.

The responsible person is defined on the Member Organization page.

Department

Select the department associated with the member organization. This selection enables you to link the member organization to a department at your institution for reporting purposes.

Unit

Select the unit associated with a volunteer from the member organization. This selection enables you to associate specific units to the member organization that might not fall within the departmental structure of your institution. For example, a unit could be a subgroup of the English Department that has alumni with a special interest in literary classics.

Rsrc Type (resource type)

To link the member organization with another member organization or an initiative, select either *Mbr Org* or *Initiative*. The fields in this row change depending on the selection you make.

Mbr Org Code (member organization code) and
Vol Structure (volunteer structure)

If you selected *Mbr Org* as a resource type, select the member organization code and the volunteer structure with which it is associated.

Intv Type (initiative type),
Initiative, and **Vol Structure**
(volunteer structure)

If you selected *Initiative* as a resource type, select the initiative type, initiative, and volunteer structure with which it is associated.

New Vol

Click to create a new volunteer structure for the member organization when no other volunteer structure is responsible for the member organization.

See Also

[Chapter 9, “Setting Up Volunteer Efforts,” Defining a Volunteer Structure, page 104](#)

Building and Merging the Membership List

This section discusses how to:

- Build member lists.
- Merge member lists.

Note. In addition to running these processes, you can add constituents as complimentary members by entering the membership through a membership session.

Pages Used to Build and Merge Membership Lists

Page Name	Object Name	Navigation	Usage
Membership Audience Build	AV_RUN_CTL_MBR	Manage Contributor Relations, Manage Memberships, Process, Membership Audience Build	Run the process that builds the list of members for a member organization (AVPMBR).
Membership Audience Merge	AV_RUNCTL_MBR_MRG	Manage Contributor Relations, Manage Memberships, Process, Membership Audience Merge, Membership Audience Merge	Run the process that moves audiences from the temporary table AV_MBR_TEMP_TBL to the permanent table AV_MEMBERSHIP.

Building the Member List

Access the Membership Audience Build page.

Membership Audience Build

Run Control ID: TESTReport ManagerProcess MonitorRun

Business Unit: MEDBUInstitution: PSUNV

Rebuild AudienceView AllFirst1 of 1Last

Mr Org	Pers/Org	Audience Code	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<div>+ -</div>

Total Build Count: 5

Membership Audience Build page

This process generates the actual list of members and stores it in a temporary table called AV_MBR_TEMP_TBL. Once the records are in this table they can be analyzed to determine if the member list is acceptable.

If you are building the audience initially, click Run to run the Membership Audience Build process. This process rebuilds the membership audiences that you select on this page and builds any defined audiences that have not previously been built.

If you have already built an audience and want to rebuild the audience, use the Rebuild Audience group box to enter your criteria. When you rebuild an audience the process adds any additional constituents that meet the audience criteria since the time the audience was last built.

Mbr Org (membership organization)	Select the membership organization to which the audience applies.
Total Build Count	Displays the number of audiences that will be built when you run this process. If the total build count is 0, an error message appears that there are no audiences to build. This number increases with each rebuild you specify.

Note. The Total Build Count field must have a count of at least 1 before running the Member Audience Build process.

Merging the Member List

Access the Membership Audience Merge page.

Membership Audience Merge

Run Control ID: PS

Report Manager [Process Monitor](#)

Business Unit: MEDBU

Institution: PSUNV

Membership Audience Merge page

This process actually adds the constituents as members of the member organization by merging any audiences in the temporary (AV_MBR_TEMP_TBL) table to the permanent (AV_MEMBERSHIP) table.

Defining Membership Initiative Goals

This section discusses how to:

- Set intermediate goals for membership initiatives.
- Set annual goals for membership initiatives.

Pages Used to Define Membership Initiative Goals

Page Name	Object Name	Navigation	Usage
Initiative Goals	AV_INTV_MEMBR_GOAL	Manage Contributor Relations, Manage Memberships, Use, Membership Goals, Initiative Goals	Set intermediate goals or milestones for an initiative.
Annual Goals	AV_MEMBR_ANNUAL	Manage Contributor Relations, Manage Memberships, Use, Membership Goals, Annual Goals	Create annual or multi-year plans to increase the number of participating members for an organization.

Setting Intermediate Goals for Membership Initiatives

Access the Initiative Goals page.

Initiative Goals **Annual Goals**

Membership: ALUMASSN 1999 Membership Drive **Institution:** PSUNV

Financial Goal: 0.00 USD **% Participtn Goal:** 0.00

Intermediate Goals/Milestones					View All	First	1 of 1	Last
*Target Date	*Goal Type	Pers/Org	Audience Code	Amount/Pct/Total:				
11/16/2000	Nbr Mbrs	Pers		5000				

Initiative Goals page

This page is used to set goals for the membership initiative, as opposed to the member organization.

Target Date

Select the date by which the goal may be reached. When you click the prompt button for this field, the pop-up calendar displays. Use the arrow keys at the bottom of the calendar to locate the appropriate month and year, then click the specific date.

Goal Type

Select the measurement by which you track the goal's progress. Valid goal types are *% Income*, *Financial*, *% Participation*, *Number of Donors*, and *Number of Volunteers*. Your institution can define additional goal types.

Audience Code

Select the audience code to which the goal pertains. Available options include all the populations defined with the type of *Segmentation* for this initiative on the Audience page.

Setting Annual Goals for Membership Initiatives

Access the Annual Goals page.

Initiative Goals **Annual Goals**

Membership: ALUMASSN 1999 Membership Drive **Institution:** PSUNV

Financial Goal: 0.00 USD **Length of Mbrshp:** 1year/6months

Member Year View All First 1 of 2 Last

Membership Year: 1 + -

Annual Goal View All First 1 of 1 Last

***Effective Date:** 07/30/1998 **Dollar Goal:** 0.00 + -

Nbr Mbrshps Goal: 0 **Mbrshp Pct Increase:** 0.00

Nbr Members Goal: 0 **Mbrs Pct Increase:** 0.00

Goal Detail View All First 1 of 1 Last

*Membership Type	*Member Status	Amount	Nbr Members
		0.00	0

Annual Goals page

This page is used to set goals for the membership initiative to be used in customized reports.

Dollar Goal	Enter the monetary amount of the overall goal that you expect to achieve during this membership campaign year from this membership initiative.
Nbr Mbrshps Goal (number of memberships goal)	Indicates the expected number of memberships to be generated during this membership campaign year from this membership initiative.
Mbrshp Pct Increase (membership percent increase)	Enter the increase in overall memberships from one year to the next expected from this membership initiative.
Nbr Members Goal (number of members goal)	Enter the anticipated number of members for this membership campaign year from this membership initiative. This number should include joint members.
Mbrs Pct Increase (members percent increase goal)	Enter the anticipated increase in members (including joint members) from one year to the next from this membership initiative.
Membership Type	Select the membership type for which you want to set a goal. Membership types are defined by your institution, but typically include values such as <i>Annual</i> , <i>Sustaining</i> , <i>Life</i> , and so on. The membership types from which you can select are determined by the setID associated with the business unit you select for the initiative.
Member Status	Select the state of the members from which memberships are received such as <i>New</i> , <i>Lapsed</i> , <i>Renewed</i> , and so on. These values are defined by your institution.
Amount and Nbr Members	Enter the monetary goal and the number of members goal.

Entering Member Dues

This section lists common elements and discusses how to:

- Enter dues payment detail.
- Assign membership designations and associate others with a membership.

Understanding Membership Dues

When you enter membership dues, you open a membership session using the Maintain Sessions page. This is similar to the page you use to open gift or pledge sessions, and the process is identical, with one exception. When you open a membership or adjust membership session, a row displays on the Maintain Sessions page with a Tender Type of Complimentary. In some cases, you may want to add constituents as a member of an organization although they do not meet the audience criteria for membership or they are not expected to pay membership dues. For example, a constituent may be a very active volunteer and you want to give him or her a complimentary Association membership.

If you plan to enter complimentary memberships within the session, indicate the number of complimentary membership transactions you plan to enter in the Expt Cnt field for this row. For regular membership dues transactions, add a row and enter the Tender Type, Expt Cnt, and Expt Amt. Because complimentary memberships are entered through a membership session, your institution can track which users are granting memberships to constituents.

Once a session is established, dues are entered using a series of membership data entry pages.

If it complies with your institution's business practices, you can enter gift transactions as well as membership transactions into a membership session. To enable this feature, you must select the Allow Gifts in Membership check box on the Institution Installation page when you set up your system.

Once a membership session is entered, you must balance and queue the session for posting.

See Also

Chapter 22, "Entering Commitments," Creating and Working With Sessions, page 373

Understanding Gift Processing in Membership Sessions

If any portion of a dues payment is a gift, or if your institution allows you to enter gifts into membership sessions, you must know how these transactions are processed.

When a transaction includes both a membership dues payment and a gift, the membership portion of the transaction is written to the membership tables in the database. Conversely, the gift portion of the transaction is written to gift tables in the database, and the donor receives hard credit for this portion.

For example, Mr. Jones writes a membership check for USD 1,000 for a lifetime membership at your institution. USD 750 of the payment is non-gift dues and USD 250 is a gift. After this transaction is processed, the Membership History page displays a lifetime dues payment of USD 1,000. The Transaction Register page displays a gift of USD 250 with a hard credit to Mr. Jones.

In another example, Mr. Jones writes a membership check for USD 1,000 to your institution for a Joint lifetime membership for himself and Mrs. Jones. USD 750 of the payment is non-gift dues and USD 250 is a gift. After the transaction is processed, the Membership History page displays a lifetime dues payment of USD 1,000 for both Mr. Jones and Mrs. Jones. The Transaction Register page displays a gift of USD 250 with a hard credit to Mr. Jones and a gift of USD 250 with a soft credit to Mrs. Jones. Any additional joint members would also receive 100 percent soft credit for the gift portion of the transaction.

The following table represents the distribution of the lifetime membership check for USD 1,000 from Mr. and Mrs. Jones.

	Without Joint		With Joint			
Record	ID 1	Recog Type	ID 1	Recog Type	ID 2	Recog Type
AV_MEMBERSHIP	1,000		1,000		1,000	
AV_MBR_DTL	1,000		1,000			
AV_GIFT_DTL	250		250			
AV_RECOGNITION	250	HARD	250	HARD	250	SOFT
AV_RCG_DES	250	HARD	250	HARD	250	SOFT

Common Element Used in This Section

Maintain Sessions

Click when you have finished entering transactions in a session. The Maintain Membership Sessions page opens to enable you to balance the session.

Pages Used to Enter Member Dues

Page Name	Object Name	Navigation	Usage
Membership Entry	AV_MBR_ENTRY	Manage Contributor Relations, Manage Memberships, Use, Membership Entry, Membership Entry	Enter basic information about dues.
Tender Type Detail – Credit Card Entry	AV_CC_PAYMENT_SP	Click the Tender Detail button on the Gift Entry, Membership Entry, Gift Adjustment, or Membership Adjustment page.	Enter detailed credit card information for gift or membership payments.
Designations	AV_MBR_ENTRY2	<ul style="list-style-type: none"> Manage Contributor Relations, Manage Memberships, Use, Membership Entry, Designations Manage Contributor Relations, Manage Memberships, Use, Membership Adjustment, Designation Adjust 	Apply payments to designations, or allocation accounts at your institution.

Entering Dues Payment Detail

Access the Membership Entry page.

Membership Entry **Designations**

Business Unit: MEDBU **Session Number:** 162 **Institution:** PSUNV [Maintain Sessions](#)

Membership Detail View All First 1 of 1 Last

☒ *ID Type: Person ID: AV0007 Whitney, Christopher Alumni 1942 ☐ Carry Transaction **Add Membership**

Membership Number: NEW

*Member Org: FRENCH French Language Enhancement Program

Level: BON ☐ Complimentary

Appeal: CALL Phone Call

Membership Status: New

Membership Type: Annual Membership

Membership Category: Single Membership

Member Payment Number: NEW

Dues Amount: 100.00 USD

Tender: CHK Check

Total Amount: 100.00 USD

Data Entry Date: 07/08/2002

Periods: 1

Start Date: 07/08/2002

Expiration Date: 12/31/2002

[Membership History](#)

Membership Entry page

Once you open a new session, this is the first page that appears. This page holds information about the Appeal, Dues Level, Amount, Tender Type, and so on.

If the Currency Code you selected for this session on the Maintain Session page differs from your business unit's base currency, two new page controls display on this page.

Currency Code	Fields That Display	Fields That Hide
Your Business Unit's Base		Display in Other Currency button
		Base Amt
Any Other Currency	Display in Other Currency button	
	Base Amt	



Click to access the Update Information page to either update an existing member's record or add a new member to the system.

Since the ID type field populates by default to *Person* on this page, the page used to add or update a person's record appears by default. To access the page used to add or update an organization's record, select *Organization* from the ID type field, enter the organization's ID, then click the Update Record button.

If you have not entered a donor's ID, you will be prompted to enter one. You can either enter the donor's ID here or leave the prompt set to *NEW*. If you leave the prompt set to *NEW*, the system assumes you are adding a new member and the pages for adding or updating a new constituent appear.

Year

If the member is an alumnus or alumna, his or her preferred year appears.



Click to access the CR Search page where you can search for a member.

See [Chapter 13, "Managing Constituent Data," Using CR Search, page 161](#).

Carry Transaction

Select to carry over values from this transaction to subsequent transactions in this session. If you select this check box, all information from this transaction is defaulted into subsequent transactions with the exception of ID, tender type fields for entry of check or credit card specific information, and recognition information. This feature is useful when entering a number of payments with the same member organization, member levels, and so on.

Member Org (member organization)

Select the member organization that the member is joining. The prompt for this field contains a list of all the member organizations for which the Allow Comp Memberships or Membership Dues Required check boxes are selected on the Member Organization page.

When you select a member organization for which the ID is already a member, the dues level populates with the last dues level for the member by default into the Level field, the Periods field populates by default to *1*, and the Total Amount field populates by default to the dues amount for the current dues level.

Membership Number

The membership number is set to *New* when you enter this page. When you select a member organization, the system checks to see if the constituent is already a member of the organization. If so, the existing membership number for the selected member organization appears. If not, a new membership number is assigned.

Note. New membership numbers are assigned based on the last membership number on the CR Installation page.

Level

Select the membership level at which a constituent joins the member organization. Levels are defined by your institution when you define the member organization. When you select a level, the system calculates the dues amount and total amount of the transaction based on the selections you made on the Membership Dues page.

If you are entering transactions in a currency other than base currency, the system populates the Base Amt field (in addition to the Dues Amt and Total Amt) and resets the exchange rate based on the data entry date when you edit this field. The designation information is also recalculated. If you are entering additional gifts in this session and change the level, you must reenter those gifts.

Appeal

Select the specific acts or items that lead a member to join the member organization, such as a specific visit, phone call, letter, and so on. Appeals are defined by your institution.

The values that display in the prompt box include the appeals you defined for the setID associated with the business unit you select for the session.

Complimentary

If the membership organization you selected allows complimentary memberships, this check box displays. Select to grant complimentary membership to the constituent. If you select this check box, the Dues Amt, Tender, and Total Amt fields on this page are removed. Additionally, you cannot edit any information on the Designations page.

Comp Check Box	Fields That Display	Fields That Hide
Selected		Dues Amt
		Tender
		Total Amt

Membership Status

This field populates based on the information the system retrieves when you select a member organization. This field is populated as follows:

Membership Status	Criteria
New	No previous membership exists for the selected member organization.
Renewed	A membership exists for the selected member organization with an expiration date that is equal to or greater than the system date or falls within the span of days specified in the Membership Days field on the Institution Installation page for organizations whose expiration dates occur on the same day every year.
Reactivated	A membership exists for the selected member organization with an expiration date that is less than the system date, less the number of days specified in the Membership Days field on the Institution Installation page.

Membership Type and Membership Category

These display once payment information is entered. This information is based on dues level.

Member Payment Number

This field populates by default to *NEW* when entering a new membership payment. Once the membership session is saved, a number is assigned to the transaction.

Dues Amount

When you select a dues level, the dues amount for that level displays as defined on the Member Dues page. Dues amount is the amount of money the constituent is paying to join the member organization.

If you enter transactions in a currency other than base currency, the system recalculates the total amount and any designation information for the transaction. If you enter additional gifts in this session and change this field, you must reenter those gifts.

Periods

Enter the number of periods for which the member wants to pay membership dues. The total amount of the dues is adjusted based on the number of periods you select.

Note. A partial dues payment entered with a total amount less than the expected amount for the level automatically calculates the new prorated period value and renders the Period field unavailable for input.

Tender

Select a monetary form in which the payment is received. Examples are *Cash*, *Credit Card*, *Check*, and so on.

The values that display in the prompt box depend upon the values you set up for on the Tender Types page for the setID associated with the business unit for this session.



If you select a tender type with a special field indicator of *Check*, enter the Check Number on the Tender Type Detail page that appears.

If you select a tender type with a special field indicator of *Credit Card*, enter the constituent's credit card information on the Tender Type Detail page that appears.

See [Chapter 22, "Entering Commitments," Entering Check or Credit Card Information, page 386.](#)

Total Amount

Dues totals are calculated by the system based on the dues amount times the number of periods for which the member is joining. This amount appears by default in the currency for the session. You can edit this field.

Note. If additional gift entries are allowed during a membership session, this amount may be overridden. To allow gifts in membership sessions, the Allow Gifts in Membership check box must be selected on the Institution Installation page.

Base Amount

If you enter this session using a currency other than base currency, the total amount for the transaction displays in your institution's base currency in this field.

Note. When you save transactions entered in a currency other than your institution's base, the amounts are converted to and stored in base currency. When you view information about these transactions on inquiry pages throughout the system, they display in base currency. However, you can view detail about the transaction currency and exchange rate by accessing the related detail page.



If you are entering this session using a currency other than base currency, click to access the Display in Other Currency page where you can view the amount in another currency and obtain exchange rate information.

If you change the exchange rate on the Display in Other Currency page, the total amount needed to match the dues amount changes. The Dues Amount is converted based on the updated exchange rate, and designation information is recalculated. If you are entering additional transactions in this session and change the exchange rate, you must reenter those transactions.

Expiration Date

The expiration date for membership appears. This field is calculated by the system based on the length of membership at various levels as defined on the Member Dues page multiplied by the periods resulting in a calculated expiration date. You can edit this field.

Membership expiration dates are calculated by the system. The following rules apply:

Membership Expiration Date Calculation Rules	
Membership Status	Calculation Rule
New or Reactivated	Today's Date plus the Duration for the Dues Code as established on the Membership Dues page.
Renewed	The last expiration date plus the Duration for the Dues Code as established on the Membership Dues page.

If an organization resets at the same time each year, the expiration date is set to the last day of the month prior to the new organization year. If the membership is received prior to the end of the current organization year and within the span of days specified for membership days on the Institution Installation page, the new expiration date is set to the last day of the month of the subsequent organization year.

Membership History

Click to view membership history for this person. The Membership History Prsn page appears.

See [Chapter 18, "Managing Membership," Viewing Membership History, page 346](#).

Entering Check or Credit Card Information

Access the Tender Type Detail page. This page changes whether you entered *CHK* or *CC* as the tender on the Membership Entry page.

Tender Type Detail	
Check Number:	<input type="text" value="2010"/>

Tender Type Detail – Check page



Check Number

If you selected Check as the tender on the Membership Entry page, enter the check number.

Tender Type Detail

Credit Card Information


Enter the information requested exactly as it appears on your credit card.

***First Name:**
***Last Name:**
***Credit Card Type:** 
***Credit Card Number:** (ex: 4111-1111-1111-1111)
***Expiration Date:**  / (ex: 01 / 2010)

Credit Card Billing Address

The billing address you specify must match your credit card company's records.

Country: [Change Country](#)
Address 1:
Address 2:
Address 3:

City:
County: **Postal:**
State:  California
Email Address:
***Telephone:**

Tender Type Detail – Credit Card page

- First Name** If entering a credit card payment for a person, enter the first name as it appears on the credit card. Include any middle initial after the first name in this field.
- Last Name** If entering a credit card payment for a person, enter the last name as it appears on the credit card. Include any suffixes (such as Jr., Sr.) after the last name in this field.
- Organization Name** If entering a payment for an organization, enter the organization name.
- Credit Card Type** Select the type of credit card the credit card holder is using. These values are set up on the Credit Card Type page.
- See [Chapter 12, “Setting Up Commitment Management,” Defining Credit Card Types, page 142.](#)

Credit Card Number

Enter the credit card holder's card number. The length of the credit card number is established on the Credit Card Type page.

Expiration Date

Enter the expiration month and year as it appears on the credit card.

Email Address

Enter the email address of the credit card holder, including the full domain name, in the form name@host.domain. For authorization and credit transactions, the third-party processor requires a value in this field. Email addresses are defined on the Electronic Addresses page.

If you do not have an email address for the contributor, the system uses the default email address you define on the CR Merchants page.

OK

Click to validate any changed information, save, and close the page.

If you chose to use the check digit algorithm on the Credit Card Type page, the validation process checks for the appropriate number of digits in the card number. The system also checks for the appropriate prefix for the credit card type and validates the expiration date format, the amount (must be greater than USD 0), and the address information. If there are any errors on this page, the system returns a message and prompts for corrections.

Cancel

Click to cancel the entry, ignore any changed information, and close the page without saving.

Assigning Membership Designations and Associating Others With a Membership

Access the Designations page.

The screenshot shows the 'Designations' page within a software application. At the top, there are tabs for 'Membership Entry' and 'Designations'. Below the tabs, the following information is displayed: Business Unit: MEDBU, Session Number: 162, Institution: PSUNV, and a link to 'Maintain Sessions'. The 'Membership Detail' section shows Member Payment Number: 54, ID: AV0007, and Member Name: Whittey, Christopher. It also displays a 'Designation Total' with Percent: 100.0000 and Amount: 100.00 USD, along with Level: BON and Total Amount: 100.00. The 'Designation Detail' section shows a table with columns: Business Unit, Designation, Initiative, Appeal, and Amount. The current entry is MEDBU, WOMENSOFT, EDU2000, CALL, and 100.00. Below the table is the text 'Women's Softball Program'. The 'Joint Records' section shows a table with columns: *ID Type, ID, and *Member Type. The current entry is Person, with empty fields for ID and Member Type. There are buttons for 'Add Membership', 'Add Designation', and '+ -' at the bottom right of the table.

Designations page

You can apply portions of a payment to multiple designations at your institution. For each designation you must associate a specific membership or campaign initiative and appeal. In addition, you can indicate whether a membership is joint, given as a gift, or a referral. The people or organizations associated with the membership in these capacities are selected on this page.

When you enter this page the system displays the default designations, initiatives, appeals, and amount defined for the member organization on the Member Dues page. For dues, you can edit the Initiative and Amount fields.

If your institution opted to allow entry of additional gifts from this component, you can select additional designations. The amounts distributed among designations must equal 100 percent of the total amount received.

Business Unit

Select the business unit to which the additional gift is being allocated. For dues transactions, this field populates by default to the business unit you selected when setting up the dues level for the organization and cannot be changed.

If you are adding a new designation row, this prompt box contains a list of all the valid business units at your institution to which security access has been granted. When you make a selection, the values in the designation and appeal prompt boxes change to display the values you defined for the setID associated with this business unit.

If you have already selected a designation and appeal, then change the business unit, your selections are backed out.

Designation

Assign a designation.

The designations you defined for the member organization on the Membership Dues page display on this page and cannot be edited. However, you can add additional records if your institution allows the entry of additional gifts in membership sessions.

If you are adding a designation, the values that display in the prompt box include the designations you defined for the setID associated with the business unit you select on this page.

Initiative

Select an initiative from the prompt containing all the current campaign and membership initiatives defined at the institutions to which you have security. The default initiative you defined for the member organization on the Membership Dues page displays in this field, but can be edited.

Appeal

The appeal you chose on the Membership Entry page is used for all designation entries derived from the Membership Dues page and cannot be edited here. To change the appeal, return to the Membership Entry page and select a new appeal code. You can add additional records if your institution allows the entry of additional gifts in membership sessions. In this case, the appeal field is editable.

If you are adding a designation row, the values that display in the prompt box include the appeals you defined for the setID associated with the business unit you select on this page.

Amt (amount)

Enter the payment to allocate to this designation. The dues amount you entered on the Membership Dues page for the member organization

displays on this page, but can be edited if your institution allows the entry of gifts in membership sessions.



Click to access the Update Information page to either update an existing joint member's record or add a new joint member to the system.

Since the ID type field populates by default to *Person* on this page, the page used to add or update a person's record appears by default. To access the page used to add or update an organization's record, select *Organization* from the ID type field, enter the organization's ID, then click the Update Record button.

If you have not entered a member's ID, you will be prompted to enter one. You can either enter the member's ID here or leave the prompt set to *NEW*. If you leave the prompt set to *NEW*, the system assumes you are adding a new member and the pages for adding or updating a new constituent appear.

Member Type

If the membership is *Joint*, a *Gift*, or a *Referral*, select the appropriate option. Gift and referral records are stored only for reference to be used in audience criteria or in customized reports.

See Also

Chapter 2, "Setting Up Your PeopleSoft Contributor Relations Framework," Setting Up Institution Defaults, page 10

Processing Member Credit Card Transactions

If your membership sessions contain credit card payments, you must process those transactions. Use the pages in the chapter referenced below to select membership transactions for processing, and authorize and settle the transactions.

See Chapter 23, "Processing Commitments and Analyzing Giving History," Processing Credit Card Transactions, page 436.

Adjusting Membership Dues Payments

This section discusses how to:

- Select posted dues transactions to be adjusted.
- Adjust dues payment details.
- Adjust designation and associated constituent information.

Understanding Membership Dues Payments

When you adjust membership dues, you open a session just as you would to adjust gifts or pledges. Once a session is established, you select the membership transactions to adjust using the Membership Adjustment Summary page. Adjustment details are entered using the Membership Adjustment and Designation Adjustment pages.

When you create an adjustment transaction, a sequence number is created to indicate that there have been multiple actions on a particular member payment number. For example, the initial entry is sequence 1 on AV_MBR_DTL; the adjusted entry is sequence 2 on AV_ADJ_MBR_DTL; and the corrected entry is sequence 3 on AV_MBR_DTL.

Note. Adjusted transactions negate the original transaction and create a new transaction record, so you enter adjustment amounts just as you would if entering the correct original transaction.

Pages Used to Adjust Membership Dues Payments

Page Name	Object Name	Navigation	Usage
Member Adjust Summary	AV_ADJ_MBR_SMRV	Manage Contributor Relations, Manage Memberships, Use, Membership Adjustment, Member Adjust Summary	Select the membership transactions to adjust in this adjustment session.
Member Adjust	AV_ADJ_MBR	Manage Contributor Relations, Manage Memberships, Use, Membership Adjustment, Member Adjust	Make adjustments to an existing membership transaction you selected on the Membership Adjustment Summary page.
Designation Adjust	AV_MBR_ENTRY2	Manage Contributor Relations, Manage Memberships, Use, Membership Adjustment, Adjust Designations	Make adjustments to assigned designations or to the links between the membership and other constituents.

Selecting Posted Dues Transactions to be Adjusted

Access the Member Adjust Summary page.

Member Adjust Summary
Member Adjust
Designation Adjust

Business Unit: MEDBU
Session Number: 163
Institution: PSUNV
[Maintain Sessions](#)

Adjust Member Payment

*ID Type: Person
ID:

Member Payment Number:
Add Adjustment

Adjusted Member Payments

View All First 1 of 1 Last

Member Payment Number	ID	Constituent	Membership Organization	Level	Dues Amount	Total Amount
54	AV0007	Whitney, Christopher	FRENCH	BON	100.00	100.00 USD

Member Adjust Summary page

Member Payment Number Enter the original number for the transaction to adjust. The existing posted membership payments for the ID you select display in the prompt box.

Note. You must enter an ID before selecting a membership payment number.

Note. You can further narrow your search by entering a Member Organization Code and Data Entry Date in the prompt box. When you enter a member organization code, existing dues transactions for the member organization you select display in the prompt box. When you enter a data entry date, transactions entered on or after the date you enter display in the prompt box.

Add Adjustment Click to display the Membership Adjustment page, where you can change transaction information.

Important! The original transaction must be posted before you can adjust it. If the transaction you are looking for does not appear in the Mbr Pmt Nbr prompt box, it is likely part of an unposted session. If the session has not been queued, you can change the membership in the original session by reopening the session, if balanced.

Adjusted Member Payment

Click the link next to a row of transaction data to display that transaction on the Membership Adjustment page, where you can make changes.

Adjusting Dues Payment Details

Access the Member Adjust page.

The screenshot displays the 'Member Adjust' page with the following details:

- Tabs:** Member Adjust Summary (selected), Member Adjust, Designation Adjust
- Business Unit:** MEDBU **Session Number:** 163 **Institution:** PSUNV [Maintain Sessions](#)
- Membership Detail:** View All First 1 of 1 Last
- ID:** AV0007 **Whitney, Christopher** **Alumni** **1942**
- *Reason:** Data entry error ☐ **Refund** [Add Membership](#)
- Membership Number:** 54
- *Member Org:** FRENCH French Language Enhancement Program
- Level:** TBIEN ☐ **Complimentary**
- Appeal:** CALL Phone Call
- Dues Amount:** 150.00 USD
- Tender:** CHK Check
- Total Amount:** 150.00 USD
- Membership Status:** New
- Membership Type:** Annual Membership
- Membership Category:** Dual Membership
- Member Payment Number:** 54
- Data Entry Date:** 07/08/2002
- Periods:** 1
- Start Date:** 07/08/2002
- Expiration Date:** 12/31/2002
- [Membership History](#)

Member Adjust page

Important! Adjusted transactions negate the original transaction and create a new transaction record, so enter adjustment amounts just as you would if entering the correct original transaction.

Refund

Select if the adjustment results in a refund to the member.

Membership Number

Displays the original membership number for the transaction to adjust. This value is selected on the Membership Adjustment Summary page. Existing information for the transaction is copied to the new transaction.

Important! The original transaction must be posted before you can adjust it. If the transaction you are looking for does not appear in the Mbr Pmt Nbr prompt box, it is likely part of an unposted session. If the session has not been queued, you can change the membership in the original session by reopening the session, if balanced.

See Also

Chapter 18, “Managing Membership,” Entering Dues Payment Detail, page 330

Adjusting Designation and Associated Constituent Information

Access the Designation Adjust page.

The screenshot displays the 'Designation Adjust' page. At the top, there are three tabs: 'Member Adjust Summary', 'Member Adjust', and 'Designation Adjust'. Below the tabs, the following information is displayed: Business Unit: MEDBU, Session Number: 163, Institution: PSUNV, and a link to 'Maintain Sessions'. The 'Membership Detail' section shows Member Payment Number: 54, ID: AV0007, and Member Name: Whittey, Christopher. Below this, the 'Designation Total' section shows Percent: 100.0000, Amount: 150.00, and Level: TBIEN. The 'Designation Detail' section lists two designations: 'Annual Fund' with an amount of 50.00, and 'Fineburg Fine Arts Scholarship' with an amount of 100.00. The 'Joint Records' section shows a dropdown for ID Type (Person) and a search field.

Designation Adjust page

You can apply portions of a payment to multiple designations at your institution. For each designation you must associate a specific membership or campaign initiative and appeal. In addition, you can indicate whether a membership is joint, given as a gift, or a referral. The people or organizations associated with the membership in these capacities are selected on this page.

When you enter this page the system displays the default designations, initiatives, appeals, and amount defined for the member organization on the Member Dues page. For dues, you can edit the Initiative and Amount fields.

If your institution opted to allow entry of additional gifts from this component, you can select additional designations. The amounts distributed among designations must equal 100 percent of the total amount received.

Designation Total

Percent

Displays the percentage of the membership dues amount that has been allocated to designations. Before you can save the page this must equal 100%.

The system displays less than 100% when the constituent donated more than the dues amount. For example, if the dues amount is USD 100 and the constituent donated USD 100 on top of the dues amount, the percentage would be 50% until you allocated the extra USD 100 to a designation.

Amount

Displays the amount of the total membership dues or gift amount that has been allocated to designations.

Designation Detail

Business Unit

Select the designation business unit to which the gift payment is being allocated. For dues transactions, this field populates by default to the business unit you selected for the session and cannot be changed.

If you are adjusting the designation row, this prompt box contains a list of all the valid business units at your institution to which security access has been granted. When you make a selection, the values in the Designation and Appeal prompt boxes change to display the values you defined for the setID associated with this business unit.

If you have already selected a designation and appeal, then change the business unit, your selections are backed out.

Designation

The designations you defined for the dues level for the member organization on the Membership Dues page display on this page and cannot be edited.

If your institution allows the entry of gifts in membership sessions and there are gifts included in the transaction you are adjusting, you can edit this field. You can select additional designations or make changes to the designations displayed here for the gift portion of the transaction.

If you are selecting a new designation, the values that display in the prompt box include the designations you defined for the setID associated with the business unit you select on this page.

Initiative

You can make changes to this field. The prompt box contains all the current campaign and membership initiatives defined at the institutions to which you have security. The default initiative you defined for the member organization on the Membership Dues page displays in this field, but can be edited.

Appeal

The appeal you chose on the Membership Adjustment page is used for all designation entries derived from the Membership Dues page and

cannot be edited here. To change the appeal, return to the Membership Adjustment page and select a new appeal code.

If your institution allows the entry of gifts in membership sessions and there are gifts included in the transaction you are adjusting, you can edit this field. You can select additional appeals or make changes to the appeals displayed here for the gift portion of the transaction.

If you are selecting a new appeal, the values that display in the prompt box include the appeals you defined for the setID associated with the business unit you select on this page.

Amount

If your institution allows the entry of gifts in membership sessions and there are gifts included in the transaction you are editing, you can edit this field.

The dues amount you entered on the Membership Dues page for the member organization displays on this page, but can be edited for increases only.

Joint Records

Member Type

Make any necessary changes to the Membership Type field to indicate whether the membership is *Joint*, a *Gift*, or a *Referral*.

See Also

Chapter 23, “Processing Commitments and Analyzing Giving History,” Processing and Posting Sessions, page 427

Chapter 18, “Managing Membership,” Assigning Membership Designations and Associating Others With a Membership, page 337

Preparing for Membership Letters

PeopleSoft provides two mass change templates that enable you to generate communications specifically for membership organization members. Use these templates, along with the Criteria and Defaults and Run Mass Change pages to generate communications for a membership audience.

See Chapter 16, “Managing Initiatives,” Understanding the Membership Mass Change Template, page 295.

Viewing Membership Progress

This section discusses how to view membership progress.

Page Used to View Membership Progress

Page Name	Object Name	Navigation	Usage
Membership Progress	AV_MEMBR_PROGRESS	Manage Contributor Relations, Manage Memberships, Inquire, Membership Progress, Membership Progress	View aggregated information of a membership initiative.

Using the Membership Progress page

Access the Membership Progress page.

Membership Progress

Membership: GLALUMASSN GLAKE Alumni Association **Institution:** GLAKE

Financial Goal: 50,000.00 USD **Total Budget:** 2,500.00
Total to Date: 35,135.00 **Expenses to Date:** 1,000.00
Pct of Goal: 70.27 **% Budget Remaining:** 60.00

Nbr Memberships: 10
Nbr Members: 10
Nbr New Members: 10
Nbr Renew Mbrs: 0
Nbr React Mbrs: 0
Nbr Life Mbrs: 8

[View All](#) [First](#) 1 of 1 [Last](#)

SetID	Appeal	Dues Amt	Number of Memberships
GLAKE	ALUMAN	35,235.00	10

Membership Progress page

Financial Goal	Displays the overall revenue goal for the membership initiative.
Total to Date	Displays the sum of all the dues amounts received for the initiative.
Pct of Goal (percent of goal)	Displays the result of the total to date divided by the financial goal.
Nbr Memberships (number of memberships)	Displays the total number of memberships received to date. This field calculates only membership payments.
Note. This field includes each actual membership, regardless of how many members it represents.	
Nbr Members (number of members)	Displays the total number of memberships received to date including joint members.
Nbr New Members (number of new members)	Displays the number of members who are paying membership dues for the first time.

Nbr Renew Mbrs (number of renewal members)	Displays the number of members who are paying membership dues as a renewal of a current membership.
Nbr React Mbrs (number of reactivating members)	Displays the number of members who are reinstating membership after it has lapsed for at least one year.
Nbr Life Mbrs (number of lifetime members)	Displays the number of new lifetime members brought in by this membership initiative.
Total Budget	Displays the total expense budget for management of this membership initiative.
Expenses to Date	Displays the total amount of expenses to date based on entries made on the Budget Detail page.
% Budget Remaining (percent of budget remaining)	Displays the calculation of Total Budget minus Expenses to Date divided by the Total Budget.

The grid on this page displays a summary of the performance of appeals sent in relation to this membership initiative. For each Appeal, you can view the Dues Amount received and the Nbr Memberships (number of memberships) generated.

Viewing Membership History

This section discusses how to view membership history information for a person.

Pages Used to View Membership History

Page Name	Object Name	Navigation	Usage
Membership History Prsn (membership history person)	AV_MBR_HSTRY_INQ, AV_MBR_HST_E_INQ, AV_MBR_HISTORY_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Memberships, Inquire, Membership History • Manage Contributor Relations, Manage Memberships, Inquire, Membership History – Org • Manage Contributor Relations, Manage Memberships, Workset, Membership History 	View information about a particular member's past participation in member organizations defined at your institution. The Membership Detail portion of the page appears only after you select a Membership Organization.
Membership Detail	AV_MBR_DTL_INQ_SP	<ul style="list-style-type: none"> • You can access the Membership Detail page through multiple navigation paths. Below is the most frequently used path. • Click a Membership Organization link on the Membership History page. 	View detailed information about a specific membership entry.
Membership Detail – Designation	AV_MBR_DTL_INQ2_SP	Click the Designation link on the Membership Detail page.	View detailed information about designations.

See Also

[Chapter 18, “Managing Membership,” Entering Dues Payment Detail, page 330](#)

[Chapter 18, “Managing Membership,” Assigning Membership Designations and Associating Others With a Membership, page 337](#)

Viewing Membership Benefit History

This section discusses how to view membership benefit history. Once membership is entered through a session, the benefits that have been earned by joining at a particular dues level are entered in the system.

Page Used to View Membership Benefit History

Page Name	Object Name	Navigation	Usage
Benefits History	AV_MBR_BNFT_HIST, AV_MBR_BNFT_HIST_E, AV_MBR_BNFT_HIST_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Memberships, Inquire Membership Benefit History • Manage Contributor Relations, Manage Memberships, Inquire Membership Benefit History – Org • Manage Contributor Relations, Manage Memberships, Workset, Membership Benefit History 	View a summary of the benefits a member has earned.

Viewing a Membership Summary or a Supervisor's Membership Summary

This section discusses how to view membership summaries.

Page Used to View a Membership Summary

Page Name	Object Name	Navigation	Usage
Membership Summary, Supervisor Membership Summary	AV_MBRSHS_SMRY	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Memberships, Inquire, Membership Summary, Membership Summary • Manage Contributor Relations, Manage Memberships, Inquire, Supervisor Membership Summary, Supervisor Membership Summary 	View information about the membership transactions in a session.

Viewing Membership Summary Information

You can view information about your own sessions on the Membership Summary page, and information about your staff's sessions on the Supervisor's Membership Summary page.

The membership number, start date, expiration date, ID and constituent name, dues amount, and total amount display for each transaction in the session you selected.

If the membership session you selected is open, select a transaction and click the Edit Mbr (edit member) button to make changes to an existing transaction. Click the Details button to view detailed information about a particular transaction on the Membership Detail page.

See Also

Chapter 18, “Managing Membership,” Entering Dues Payment Detail, page 330

CHAPTER 19

Managing Volunteers

This chapter gives an overview of volunteer management, lists prerequisites, and describes how to:

- Manage general initiative information.
- Assign volunteers to roles.
- Assign volunteers to specific tasks.
- Create a biographical bit or brief.
- Review a volunteer's history.
- Review a volunteer's audience history.

See Also

Chapter 9, "Setting Up Volunteer Efforts," page 99

Understanding Volunteer Management

Once you create an initiative or define a membership organization, you can create the volunteer structure necessary for the effort to succeed. You can then assign volunteers to the positions within the volunteer structure and assign additional volunteers to perform specific tasks.

A volunteer effort is one type of initiative in PeopleSoft Contributor Relations. All initiative types share some common management pages. Some initiatives, such as volunteers, require additional management that is specific to their purpose. The volunteer-specific management is covered in this chapter; refer to the chapter below for information about managing all types of initiatives.

See Also

Chapter 16, "Managing Initiatives," page 269

Prerequisites

Before you can manage a volunteer effort, you must have one set up. There are common initiative setup pages for this task, and also volunteer-specific setup pages that enable you to complete volunteer effort setup.

See Chapter 6, "Setting Up Initiatives," page 67 and Chapter 9, "Setting Up Volunteer Efforts," page 99.

Before you can assign volunteers to tasks, roles, and projects, you must set up your system's volunteer data.

See [Chapter 2, “Setting Up Your PeopleSoft Contributor Relations Framework,” Adding Resources, page 27](#).

Managing General Initiative Information

You manage volunteer efforts in PeopleSoft Contributor Relations by using the common initiative functionality found throughout the system. Initiatives are the common link between campaigns, events, volunteer efforts, and membership initiatives at your institution.

A volunteer initiative is used to manage a volunteer effort. It has its own audience, resources, related initiatives, and PR plan. Use the chapter referenced below to define the basics for the initiative. You can then use this chapter to manage the remaining volunteer-specific functionality.

See [Chapter 16, “Managing Initiatives,” page 269](#).

Assigning Volunteers to Roles

One of the ways to link volunteers to a project is to assign them to a role within a leadership group.

This section discusses how to

- Assign volunteers to roles.
- Create sub-group volunteer assignments.

See Also

[Chapter 19, “Managing Volunteers,” Assigning Volunteers to Specific Tasks, page 354](#)

Pages Used to Assign Volunteers to Roles

Page Name	Object Name	Navigation	Usage
Volunteer Group Assignments	AV_VOL_GRP1_ASGN, AV_VOL_GRP1_ASGN_M	<ul style="list-style-type: none"> Manage Contributor Relations, Manage Volunteers, Use, Initiative Ldrshp Assignments, Volunteer Group Assignments Manage Contributor Relations, Manage Volunteers, Use, Member Org Ldrshp Assignments, Volunteer Group Assignments 	Begin the process of assigning volunteers to the positions outlined in the volunteer structure. When you save the Leadership Group and Sub-Group pages, the system populates this page with each position that you outlined in the structure so that you can assign volunteers to them.
Sub-Group Assignments	AV_VOL_GRP2_ASGN, AV_VOL_GRP2_ASGN_M	<ul style="list-style-type: none"> Manage Contributor Relations, Manage Volunteers, Use, Initiative, Ldrshp Assignments, Sub-Group Assignments Manage Contributor Relations, Manage Volunteers, Use, Member Org Ldrshp Assignments, Sub-Group Assignments 	Begin the process of assigning volunteers to the sub-group positions outlined in the volunteer structure.

Assigning Volunteers to Roles Within the Structure

Access the Volunteer Group Assignments page. This page populates with the roles you defined on the Volunteer Structure page. Here, you can assign volunteers to fill each position outlined in the structure.

Volunteer Group Assignments **Sub-Group Assignments**

Initiative: ALUMASSN **Intv Type:** MEMBERSHIP **Institution:** PSUNV
Initiative Name: 1999 Membership Drive

View All First 1 of 1 Last

Leadership Group: Board of Directors

View All First 3 of 7 Last

Role: Committee Member **Term Length:** 1 Yr. ☐ Required

View All First 1-2 of 2 Last

Volunteer ID	*Start Date	End Date	
1 AV0001	01/01/2001	01/14/2001	Gallegher, Shawn
2 AV0007	01/15/2001	01/15/2002	Whitney, Christopher

Volunteer Group Assignments page

Scroll through the list of roles and term lengths and enter the Volunteer ID, Start Date, and (optional) End Date for each assignment to the volunteer structure.

Important! If a required position has not been filled when you save this page, a warning message appears. You can choose to assign a volunteer to the required position or save anyway.

Creating Sub-Group Assignments

Access the Sub-Group Assignments page. This page populates with each role you defined in the structure on the Sub-Groups page. Here, you can assign volunteers to fill those roles.

Sub-Group Assignments page

Scroll through the list of roles and term lengths and enter the Volunteer ID, Start Date, and (optional) End Date for each assignment to the volunteer structure.

Important! If a required position has not been filled when you save this page, a warning message appears. You can choose to assign a volunteer to the required position or you can save without assigning a volunteer.

Assigning Volunteers to Specific Tasks

One of the ways to link volunteers or groups of volunteers to a project is to assign them to a specific volunteer task.

This section lists prerequisites and discusses how to:

- Assign volunteers and groups to tasks.

- Enter constituent data and volunteer evaluations.

See Also

[Chapter 19, “Managing Volunteers,” Assigning Volunteers to Roles, page 352](#)

Prerequisites

Before you can assign volunteers to projects, you must:

- Define assignment types on the Assignment Type page.
- Define a volunteer initiative on the Volunteers page.
- Set up contact types on the Contact Types page.

Pages Used to Assign Volunteers to Specific Tasks

Page Name	Object Name	Navigation	Usage
Volunteer Assignments 1	AV_VOL_ASGN1, AV_VOL_ASGN1_M	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Volunteers, Use, Initiative Vol Assignments, Volunteer Assignments 1 • Manage Contributor Relations, Manage Volunteers, Use, Member Org Vol Assignments, Volunteer Assignments 1 	Begin the process of assigning individuals and volunteer groups to specific tasks.
Volunteer Assignments 2	AV_VOL_ASGN2, AV_VOL_ASGN2_M	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Volunteers, Use, Initiative Vol Assignments, Volunteer Assignments 2 • Manage Contributor Relations, Manage Volunteers, Use, Member Org Vol Assignments, Volunteer Assignments 2 	Continue the process of assigning individuals and volunteer groups to specific tasks.

Assigning Volunteers and Groups to Tasks

Access the Volunteer Assignments 1 page. You have already defined a volunteer leadership structure and volunteer roles; use this page to assign individuals and groups to specific tasks related to the initiative.

Volunteer Assignments 1 **Volunteer Assignments 2**

Initiative: ANNFUND **Intv Type:** CAMPAIGN **Institution:** PSUNV

Initiative Name: Annual Fund Campaign

View All First 1 of 1 Last

Volunteer ID: AV0001 Gallegher, Shawn + -

Volunteer Group:

View All First 1 of 2 Last

Start Date: 11/01/1998 ☐ Carry Transaction + -

End Date:

Assignment Type: LEGIS Legislative

Area of Responsibility: CNGRS Congress Members

Volunteer Mgr: AV0008 Carroll, James

Volunteer Assignments 1 page

Volunteer ID and Volunteer Group Enter the volunteer ID of the individual or the volunteer group that you are assigning.

Assignment Type Enter an assignment type. The values *Student Recruitment*, *Career Services*, and *Legislative* are shipped with your system, but your institution can define additional values.

Area of Responsibility Enter the area of responsibility for the individual or group that you are assigning. Areas of responsibility describe the sphere of accountability for the assignment type that you selected. Values for this field are defined by your institution on the Area of Responsibility page.

Carry Transaction Select this check box if you are assigning many volunteers to the same basic assignment. If you choose this option, when you add additional volunteer assignments, the values for Start Date, Assignment Type, Area of Responsibility, and Volunteer Manager carry to subsequent transactions.

Volunteer Mgr (volunteer manager) Enter the constituent to whom the volunteer is responsible.

Entering Constituent Data and Volunteer Evaluations

Access the Volunteer Assignments 2 page. This page enables you to assign individuals and groups to make contact with constituents. You can also rate volunteers on their effectiveness here.

Volunteer Assignments 1 Volunteer Assignments 2

Initiative: ANNFUND **Intv Type:** CAMPAIGN **Institution:** PSUNV

Initiative Name: Annual Fund Campaign

View All First 1 of 1 Last

Volunteer ID: AV0001




Volunteer Group:

View All First 1 of 2 Last


Start Date: 11/01/1998 **Assignment Type:** Legislative

End Date: **Area of Responsibility:** Congress Members

View All First 1 of 1 Last

***EmplID** AV0002  Isenberg,Robin ***Contact Type** Letter **Completed** ☒  

Effectiveness Rating: Fair **Assign Again** ☒ **Potential Leader** ☐

Future: 

Volunteer Assignments 2 page

- EmplID** (employee ID) Enter the ID of the constituent the volunteer is to contact. The person's name appears to the right of this field.
- Contact Type** Select the type of communication that the volunteer is expected to have with the constituent. Contact types are defined by your institution. If you enter an ID, you must select a contact type.
- Completed** Select when the contact with the volunteer is complete.
- Effectiveness Rating** Record a volunteer's performance on a limited basis. Valid ratings are *Excellent*, *Good*, *Fair*, and *Poor*.
- Assign Again** Select to assign the volunteer again in the future.
- Potential Leader** Select if the volunteer has demonstrated potential as a leader.
- Future** Enter any recommendations for involving this volunteer further. This is a free-text field.

Creating a Bio Bit or Brief

Use the Biographic Profile component to prepare and generate biographic reports about potential volunteers and constituents in the system. The Biographic Report page enables you to select criteria to include in the report, so you can create anything from a comprehensive report (used to qualify a volunteer) to a limited report about a constituent (for a volunteer to use during contacts).

See Also

[Chapter 14, “Managing Prospects,” Tracking Prospect Data, page 215](#)

[Appendix A, “PeopleSoft Contributor Relations Reports,” PeopleSoft Contributor Relations Reports: Selected Reports, page 575](#)

Viewing Volunteer History

This section discusses how to review volunteer history information.

Pages Used to Review Volunteer History

Page Name	Object Name	Navigation	Usage
Volunteer History	AV_VOL_HIST, AV_VOL_HIST_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Volunteers, Inquire, Volunteer History • Manage Contributor Relations, Manage Volunteers, Workset, Volunteer History 	Review information about a particular volunteer’s past involvement at your institution.
Volunteer Assignment Detail	AV_VOL_ASG2_SP	Click the Details link on the Volunteer History inquiry page.	Review detailed information about a volunteer’s activity.
Audience History	AV_AUD_HISTORY, AV_AUD_HISTORY_E	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage People, Inquire, Audience History • Manage Contributor Relations, Manage Organizations, Inquire, Audience History • Manage Contributor Relations, Manage Prospects, Inquire, Audience History 	Review all of the target audiences to which a volunteer or potential volunteer belongs.

Reviewing Volunteer Involvement

Access the Volunteer History page.

Volunteer History

Gallegher, Shawn
ID: AV0001
Constituent Type: [Alumni](#)
Year: 2001
Institution: PSUNV

*Time Frame:

Volunteer Since: 07/01/1998

Volunteer Activity	Volunteer Role	Start Date	End Date	Years of service	Details
1 Annual Fund Campaign	Legislative	11/01/1998		4 years 6 months 1 day	Details
2 Annual Fund Campaign	Arizona High Schools	07/01/1998		4 years 10 months 1 day	Details

Volunteer History inquiry page

Search

Click to return all volunteer history records that fall within the time frame you selected.

Details

Click to access the Volunteer Assignment Detail page, where you can view detailed information about the volunteer's activity.

Viewing Volunteer Audience History

Use the Audience History page to view all of the target audiences to which a volunteer or potential volunteer belongs. Audiences are defined for both initiatives and membership organizations and are based on a variety of attributes. For example, an audience might consist of all constituents or volunteers who have an involvement of GOLF.

See Also

Chapter 13, "Managing Constituent Data," Viewing a Constituent's Audience History, page 191

CHAPTER 20

Managing Event Initiatives

This chapter gives an overview of event initiative management, lists prerequisites, and describes how to:

- Manage general initiative information.
- Prepare for initiative letters.
- Set intermediate goals for events.
- Create events.
- Assign meeting details.
- Track event attendance.
- Create event templates.
- Review events, meetings, and attendees.
- View a to do list.

See Also

Chapter 10, “Setting Up Event Initiatives,” page 109

Understanding Event Initiative Management

Events can range from a simple banquet to a labor-intensive multi-day reunion, and their purpose can be either to generate significant revenue or solely to build your constituent community. No matter the goal, each event requires planning time and staff attention to ensure success. PeopleSoft Contributor Relations provides the capability to effectively plan, manage, and track these events.

PeopleSoft Contributor Relations Event Management functionality interfaces with the Event Management functions found in PeopleSoft Student Administration Solutions. The processes of creating events, assigning meeting details, tracking attendance, creating event templates, and tracking events are identical to the processes found in the Student Administration system.

In addition to the functionality provided through Student Administration, PeopleSoft Contributor Relations provides the tools to define an event’s structure or planning path.

An event initiative is one type of initiative in PeopleSoft Contributor Relations. Although all initiative types share some common management pages, event initiatives have their own audience, resources, related initiatives, and PR plan. Some initiatives, such as events, require additional management that is specific to their purpose. The event-specific management is covered in this chapter; refer to the chapter below for information about managing all types of initiatives

See Also

Chapter 16, “Managing Initiatives,” page 269

Prerequisites

Before you can manage an event initiative, you must have one set up. There are common initiative setup pages for this task, and also event-specific setup pages that enable you to complete event initiative setup.

See Chapter 6, “Setting Up Initiatives,” page 67 and Chapter 10, “Setting Up Event Initiatives,” page 109.

Managing General Initiative Information

You manage events in PeopleSoft Contributor Relations by using the common initiative functionality found throughout the system. Initiatives are the common link between campaigns, events, volunteer efforts, and membership initiatives at your institution.

In order to manage an event initiative, one must exist; that means that you have defined the basic features of the event initiative, its audience, resources, any related initiatives, and a public relations plan. You can then use this chapter to manage the remaining event initiative-specific functionality, including setting goals and managing the details of the event.

See Chapter 16, “Managing Initiatives,” page 269.

Preparing for Initiative Letters

PeopleSoft provides two mass change templates that enable you to generate communications specifically for initiative audiences. Use these templates, along with the Criteria and Defaults and Run Mass Change pages to generate communications for an initiative audience.

See Chapter 16, “Managing Initiatives,” Understanding the Initiative Mass Change Template, page 294.

Setting Intermediate Goals for Events

This section discusses how to set goals or milestones for an event.

Page Used to Set Intermediate Event Goals

Page Name	Object Name	Navigation	Usage
Event Goals	AV_INTV_EVNT_GOAL	Manage Contributor Relations, Manage Events, Use, Event Goals, Event Goals	Set intermediate goals or milestones for an event.

Using the Event Goals Page

Access the Event Goals page.

Event Goals

Event:

HC99

Homecoming 1999

Institution:

PSUNV

Financial Goal:

200,000.00 USD

% Participtn Goal:

30.00

Intermediate Goals/Milestones

[View All](#) [First](#) 1-6 of 7 [Last](#)

*Target Date	*Goal Type	Pers/Org	Audience Code	Amount/Pct/Total	
10/30/1999	Attendance	Pers	CLASS 49	250	<div>+ -</div>
06/30/1999	Attendance			100,000	<div>+ -</div>
06/30/1999	Average Gift			100.00	<div>+ -</div>
06/30/1999	Number Donors	Pers	CLASS 49	200	<div>+ -</div>
06/30/1999	Financial	Pers	CLASS 89	1,000.00	<div>+ -</div>
12/31/1998	% Participation	Pers	CLASS 89	100.00	<div>+ -</div>

Event Goals page

Upon entering this page, the Financial Goal and % Participtn Goal for the event display. These goals are defined on the Event Initiative page.

Target Date	Enter the date by which the goal may be reached
Goal Type	Select the measurement by which you track the goal’s progress. Valid goal types are <i>% Income</i> , <i>Financial</i> , <i>% Participation</i> , <i>Number of Donors</i> , and <i>Number of Volunteers</i> . Your institution can define additional goal types.

Target Date	Enter the date by which the goal may be reached
Audience	Enter the audience code to which the goal pertains. The field contains a list of all the populations defined by your institution with the type of <i>Segmentation</i> for this initiative on the Audience page.
Amount/Pct/Total	Determine whether you are tracking percentages, amounts, or total numbers and enter the appropriate goal amount.

Creating Events

Use the Event and Event Template pages to initially create an event and set up any associated meetings. When you create a new Event the system assigns an Event ID to the event. This ID is the link between these pages and the pages used to structure an event.

The meetings you associate with an event can be receptions, dinners, golf tournaments, lectures and so on.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Setting Up Events”

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Events Data,” Creating an Event

Assigning Meeting Details

Once you have added meetings to an event in the Meeting Template page you still need to add details about those meetings such as dates, times, and locations. This is done using the Meeting Detail pages. Meetings can also be added to an event using these pages.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Events Data,” Entering Meeting Details

Tracking Event Attendance

You have the option of tracking attendance at the meetings associated with an event. You probably want to track attendance for conferences, but not necessarily for department meetings.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Events Data,” Tracking Event Attendance

Creating Event Templates

An event template is made up of definitions of the meetings that make up that event and the resources required by those meetings. It is not necessary to create event templates before creating events. However, event templates are useful if you organize a particular type of event often and that event tends to require the same resources and staff each time. Event templates are also useful in that they can act as guidelines for assigning staff and resources for events. Some event templates may have been set up during the setting up of your system. If the event template you want is not set up, you probably want to create one.

Important! You can create only one event template for each event type.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Setting Up Events,” Creating an Event Template

Reviewing Events, Meetings, and Attendees

Once you have planned your events there are many ways you can review all of the event information. You can view:

- Events by facility.
- Meetings for an event.
- Attendees for an event.
- Attendees for a meeting.
- Meetings for a specific attendee.
- Events for a specific attendee.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, “Managing Events Data,” Reviewing Events, Meetings, and Attendees

Viewing Your To Do List

Use the Staff, Volunteer, and Unit To Do List pages to view lists of all the actions a resource is responsible for during a particular time frame or for a particular designee.

See Also

[Chapter 16, “Managing Initiatives,” Viewing Your To Do List, page 291](#)

CHAPTER 21

Managing Other Initiatives

This chapter gives an overview of other initiative management, lists prerequisites, and describes how to:

- Manage general initiative information.
- Prepare for membership and initiative letters.
- Set intermediate goals for other initiatives.
- View to do lists.

See Also

Chapter 11, “Setting Up Other Initiatives,” page 111

Understanding Other Initiatives

The Other Initiatives portion of PeopleSoft Contributor Relations provides the flexibility to manage initiatives that do not fall within the boundaries of a campaign, event, membership initiative, or volunteer effort. An other initiative provides the flexibility to identify initiatives that are important only to your institution’s business process, that cannot be categorized as one of the initiative categories above. An example would be an initiative created to send constituents a birthday greeting each year.

An other initiative is one type of initiative in PeopleSoft Contributor Relations. Other initiative types share common management pages with all initiatives. Refer to the chapter below for information about managing all types of initiatives.

See Also

Chapter 16, “Managing Initiatives,” page 269

Prerequisites

Before you can manage an other initiative, you must have one set up. There are common initiative setup pages for this task.

See Chapter 6, “Setting Up Initiatives,” page 67 and Chapter 11, “Setting Up Other Initiatives,” page 111.

Managing General Initiative Information

You manage other initiatives in PeopleSoft Contributor Relations by using the common initiative functionality found throughout the system. Initiatives are the common link between campaigns, events, volunteer efforts, and membership initiatives at your institution.

In order to manage an initiative, one must exist for each new other initiative at your institution. That means that you have defined the basic features of the initiative, its audience, resources, any related initiatives, and a public relations plan. You can then use this chapter to manage the remaining initiative-specific functionality.

See [Chapter 16, “Managing Initiatives,” page 269](#).

Preparing for Initiative Letters

PeopleSoft provides two mass change templates that enable you to generate communications specifically for initiative audiences. Use these templates, along with the Criteria and Defaults and Run Mass Change pages to generate communications for an initiative audience.

See [Chapter 16, “Managing Initiatives,” Understanding the Initiative Mass Change Template, page 294](#).

Setting Intermediate Goals

This section discusses how to set intermediate goals for an other initiative.

Page Used to Set Intermediate Goals for Other Initiatives

Page Name	Object Name	Navigation	Usage
Other Initiative Goals	AV_INTV_OTHR_GOAL	Manage Contributor Relations, Manage Other Initiatives, Use, Other Intv Goals, Other Initiative Goals	Set up intermediate goals or milestones for an initiative.

Using the Other Initiative Goals Page

Access the Other Initiative Goals page.

Other Initiative Goals

Initiative: MERGERS **Intv Type:** OTHER **Institution:** PSUNV

Initiative Name: Miami Mergers

Financial Goal: 0.00USD **% Participtn Goal:** 0.00

Intermediate Goals/Milestones [View All](#) First 1-6 of 7 Last

*Target Date	*Goal Type	Pers/Org	Audience Code	Amount/Pct/Total	
10/30/1999	Attendance	Pers	CLASS 49	250	+ -
06/30/1999	Average Gift			100.00	+ -
06/30/1999	Number Donors	Pers	CLASS 49	20	+ -
07/01/1999	Financial	Pers	CLASS 89	1,000.00	+ -
06/30/1999	Financial			100,000.00	+ -
12/31/1998	% Participation	Pers	CLASS 89	10.00	+ -

Other Initiative Goals page

Upon entering this page the Financial Goal and Participation Goal for the initiative display. These goals are defined on the Other Initiatives page. However, some initiatives do not have goals because they exist to build goodwill; therefore you would not expect a return of any kind.

Target Date Enter the date by which the goal may be reached.

Goal Type Select the measurement by which you track the goal's progress.

Audience Enter the audience code to which the goal pertains. Available options include all the populations defined for this initiative with the type of *Segmentation* on the Audience page.

Viewing Your To Do List

Access the Staff, Volunteer, and Unit To Do List pages to view lists of all the actions a resource is responsible for during a particular time frame or for a particular designee.

See Also

Chapter 16, "Managing Initiatives," Viewing Your To Do List, page 291

CHAPTER 22

Entering Commitments

This chapter provides an overview of the gift and pledge process, lists common elements, and discusses how to:

- Create and work with sessions.
- Manage sessions.
- Enter gifts and pledge payments.
- Load mass gift and pledge transactions.
- View gifts.
- Adjust gifts.
- Adjust gift and membership credit card payments.
- Enter conditional pledges.
- Enter pledges.
- View pledges.
- Adjust pledges.

Understanding the Gift and Pledge Process

Using PeopleSoft Contributor Relations, you can apply multiple designations, or allocation accounts, to a single gift or pledge. For each designation you apply, you select an associated campaign and appeal. You can also recognize one or more donors for a single gift or pledge in the form of hard or soft credits. Hard credits represent actual gift monies, while soft credits represent credits such as vehicle and memo credits. Gifts can also be designated in honor or memory of a particular person and tracked as such.

When entering pledges in PeopleSoft Contributor Relations, you also set up a pledge payment schedule. Pledge payment schedules can be set up so that payments are due in regular increments of time such as weekly, monthly, and so on. Or, you can create an irregular payment schedule, where you specify the date and amount of each pledge payment.


In addition, many donations can be matched by employers or by other organizations with which the donor is affiliated. Using PeopleSoft Contributor Relations, you can track information about the types of gifts organizations match, then have the system calculate a “best guess” of the potential matches for a particular gift. You can overwrite that “best guess” to reflect the actual matching amount expected for a gift, then track actual matching payments against your expectations.

Once a session of gift or pledge transactions is posted, you can make necessary adjustments through an adjustment session. When you adjust a transaction, the system negates the original transaction you created, and stores the adjusted one.

In addition to creating sessions of transactions, you can create Conditional Pledges, which hold pledge information that only becomes valid once particular conditions are met. For example, if Shawn Gallegher pledges USD 40,000 to your 1998 Fund Campaign, but will only give that amount once you have raised USD 2,000,000, his pledge is conditional. You can transfer the information you enter about conditional pledges to the actual pledge transaction once the conditions are met and the pledge is activated.

Once transactions are entered in the system, you can track a donor's giving patterns and history. You can view giving information from a very high level, such as a commitment summary (which is a summary of a donor's total commitments and giving history), down to a very detailed level, such as a transaction register (which shows how a transaction is allocated to a designation). In addition, you can generate acknowledgement letters and receipts to recognize donor's gifts.

Common Elements Used in This Chapter

ID Type	Select whether the donor is a person or an organization.
ID or Org ID	Displays the donor's ID or enables you to enter the ID of the donor to work with. The donor's name or description may appear to the right.
Constituent	Displays the donor's name if it is a person, or description if it is an organization. The donor's highest priority constituent type may appear to the right.
	Click to access the CR Search page where you can search for a donor. See Chapter 13, "Managing Constituent Data," Using CR Search, page 161 .
Recognition	Select a type of credit the donor is receiving, such as <i>Hard</i> , <i>Soft</i> , <i>Vehicle</i> , and so on. Recognition types are defined by your institution, but always contain at least one hard credit type.
Anonymous	Select if the donor receiving recognition does not want public recognition for the gift. There is no automated process of anonymity in the system. However, the Anonymous check box on the Giving Profile is selected if any gift a donor makes is anonymous.
Description	Enter any descriptive text to track about the gift or pledge.
Maintain Sessions	Click to access the Maintain Sessions page where you can check expected and actual amount and balance the session.
Session Defaults	Click to view or update the defaults you set for this session using the Session Defaults page.
Session Details	Click to access the Session Details page where you can view information about all the transactions in the session. You can access specific transactions to update or delete them from this page.

Creating and Working With Sessions

Gift and pledge transactions are entered in sessions, which are groups of gifts, pledges, or adjustment transactions. When you create a session, you enter expected counts and amounts, and can select default values to carry throughout transactions in the session.

The gift and pledge process requires several steps to get gift and pledge transactions entered and in some cases ultimately posted to your institution's financial system. Portions of this process are most likely handled by a supervisor or an automatically scheduled process, while others are handled by the gift entry user.

Following are the steps required:

1. Open a gift or pledge session for a business unit.

This session can be a regular entry session or an adjustment session. Establish expected counts and amounts, and (optional) select session defaults.

2. Enter transactions into the session by following the processes for gift entry, pledge entry, gift adjustment, or pledge adjustment.

Assign each transaction to one or more designations and apply hard and soft recognition. Designations are funds at your institution to which donations and pledges can be allocated.

3. Balance the session, then queue it for posting using the Queue Sessions for Posting page.
4. Run the GL Interface process.

This process can be run manually, but most often it runs automatically using Process Scheduler. This process copies the transaction data from your system into a table called AV_ACCTG_LN. In this table the transactions are associated with the appropriate account in your institution's financial system based on the item types used when you set up designations.

5. For commitment transactions to appear on the Inquiry pages, you must then run the Accumulator process.

See [Chapter 23, "Processing Commitments and Analyzing Giving History," Understanding the Constituent Accumulators Process, page 431.](#)

Managing Sessions

This section discusses how to:

- Initialize and balance a session.
- Select session defaults.
- View session detail and select transactions to modify.

Pages Used to Manage Sessions

Page Name	Object Name	Navigation	Usage
Maintain Sessions	AV_BTCH_TOT, AV_BTCH_PL_TOT, AV_BTCH_M_TOT	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Use, Maintain Gift Sessions • Manage Contributor Relations, Enter Commitments, Use, Maintain Pledge Sessions • Manage Contributor Relations, Manage Memberships, Use, Membership Sessions 	Open a new gift, pledge, or membership session, setting expected transaction counts and amounts. Balance your expected and actual gift, pledge, and membership transaction totals in an open session.
Session Defaults	AV_BTCH_DEF	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Use, Maintain Pledge Sessions, Session Defaults • Manage Contributor Relations, Enter Commitments, Use, Maintain Gift Sessions, Session Defaults 	Select a default designation business unit, designation, initiative code, appeal code, and tender type for transactions in the session.
Session Detail	AV_BTCH_LIST	Manage Contributor Relations, Enter Commitments, Use, Maintain Gift Sessions, Session Detail	View a summary list of each transaction in a session. You can also select specific transactions and choose to edit or delete them.

Initializing and Balancing the Session

Access the Maintain Sessions page.

Maintain Sessions
Session Defaults
Session Detail

Business Unit: MEDBU
Session Number: NEW
Institution: PSUNV

Status: Open
Last Modification Date:
User ID: PS

Date Opened:
Balance Date:
Post Date:

Currency Code: USD US Dollar
Self Service Session

Batch Totals
View All
First
1-2 of 2
Last

Tender Type	Expected Count	Expected Amount	Actual Count	Actual Amount	Difference Count	Difference Amount
CHK	5	500.00	0	0.00	5	500.00
CC	10	1,000.00	0	0.00	10	1,000.00
Total						
	15	1,500.00	0	0.00	15	1,500.00

Balance
Session Entry

Maintain Sessions page

Before you can enter gift, pledge, or adjustment transactions, you must create a new session. Sessions are essentially groups of like transactions within a business unit that balance together. Sessions are controlled by the user who creates them, but can be transferred between users by Gift and Pledge Supervisors.

Initializing the Session

Currency Code

Enter a currency code for the session. It defaults to the base currency for your business unit, but can be changed.

Note. You cannot mix currency codes within a session.

The currency code you select becomes the currency used for all transactions entered in this session. However, gift amounts are stored in your institution's base currency, and related inquiry pages display gift information in your institution's base currency. Additionally, you have the ability to view information about the currency in which the transaction was entered and the exchange rate.

Note. Pledge and Pledge Adjustment sessions can only be entered using your business unit's base currency. You cannot change the currency code in these instances.

Tender Type

Select a tender type for which you enter transactions from the prompt box. The tender type represents all the transactions in a session that match the tender type when you enter actual totals.

Note. You can mix multiple tender types within a session

The values that display in the prompt box depend upon the values you set up for on the Tender Types page for the setID associated with the Business Unit for this session.

If you are establishing a pledge or pledge adjustment session, the tender type of *Pledge* automatically populates this field.

If you are establishing a membership or membership adjustment session, the tender type of *Complimentary* automatically populates the first row of this field. If you plan to enter complimentary memberships within the session, indicate the number of complimentary membership transactions you plan to enter in the expected count field for this row. For regular membership dues transactions, enter the tender type, expected count, and expected amount on additional rows just as you would with a gift session.

Expected Count	Enter the number of transactions you expect to enter in your session with the tender type you selected. The expected count must be at least 1.
Expect Amount	Enter the total amount of donations or pledges you expect to enter with the tender type you selected.
Session Entry	Click to begin entering transactions. An intermediate page appears before the transaction entry page; click the Add button to add a transaction to the session.

Balancing the Session

Once transactions are entered in the session, verify that the expected count and expected amount values match the actual count and actual amount values. The expected values are those you enter before adding transactions in the session, and the actual values are calculated by the system as transactions are entered and applied to the session. The expected and actual values must match for a session to balance. If these values do not match, the difference between the two is displayed in the difference count and difference amount fields.

If the expected and actual amounts do not match, you must return to the session and correct the imbalance.

Self-Service Session	If this check box is selected, indicates that this open session contains gifts created through self-service online giving.
Balance	Click to balance the session once transactions are entered and the expected totals equal actual totals.

Note. If the transaction does not balance and you suspect a data entry error, a person who has been assigned the role of GPS (gift and pledge supervisor) or MS (membership supervisor) supervisor in the system can reopen the counts and amounts to correct the error.

Once the session balances, it is available to queue and post.

See Also

[Chapter 23, “Processing Commitments and Analyzing Giving History,” Re-Opening and Editing Expected Counts and Amounts for Sessions, page 457](#)

Selecting Session Defaults

Access the Session Defaults page. The page populates with user default values, defined on the Operator Defaults page. However, you can override the values as needed, or change defaults mid-session. Setting defaults here speeds transaction entry during a session.

Maintain Sessions **Session Defaults** **Session Detail**

Business Unit: MEDBU **Session Nbr:** 95 **Institution:** PSUNV
Status: Open **Last Mod Date:** 07/15/2001 **User ID:** PS
Date Opened: 07/15/2001 **Balance Date:** 07/15/2001 **Post Date:** 07/15/2001

Session Default

Business Unit: MEDBU Medical Business Unit **Carry Transaction:** 193

Designation: MEDICALBLDG Medical School Building Fund

Initiative Code: MED BLDG Medical Building Campaign

Appeal Code: ANNUAL Annual Fund

Tender Type: CHK Check

Balance [Session Entry](#)

Session Defaults page

- | | |
|--------------------------|--|
| Business Unit | Enter the default value to populate the Business Unit field when assigning designations for transactions in this session. |
| Designation | Enter the default value to populate the Designation field when assigning designations for transactions in this session. |
| Initiative Code | Enter the default value to populate the Campaign field when assigning designations for transactions in this session. |
| Appeal Code | Enter the default value to populate the Appeal field when assigning designations for transactions in this session. |
| Tender Type | Enter the default value to populate the Tender Type field when entering information on the Gift Entry page for transactions in this session.

If you are creating a pledge session, the Tender Type field does not appear. |
| Carry Transaction | Select a transaction number to carry all the values from that transaction to subsequent transactions in the session. To do this, you must have established at least one transaction. Once you select a transaction number, all information from the transaction populates into subsequent transactions, with the exception of donor ID, recognition, and tribute information. The values override any other session defaults you have selected on this page.

This feature is useful when entering a number of donations with the same amounts, designations, and so forth such as alumni membership dues. |

Note. If you select a new business unit, the remaining fields on this page default to the values set as user defaults for that business unit; however, you can override these values.

See Also

Chapter 2, “Setting Up Your PeopleSoft Contributor Relations Framework,” Defining User Defaults, page 7

Viewing Session Details and Selecting Transactions to Edit or Delete

Access the Session Detail page. Not only can you view session details here, but you can also select transactions to edit or delete.

Session Detail						
Business Unit:	MEDBU	Session Nbr:	95	Institution:	PSUNV	
Status:	Open	Last Mod Date:	07/15/2001	User ID:	PS	
Date Opened:	07/15/2001	Balance Date:	07/15/2001	Post Date:	07/15/2001	
		Total Count:	3	Total Amount:	80,300.00	USD

Select	Gift Nbr	ID	Constituent	Gift Date	Tender	Gift Amount
<input type="checkbox"/>	213	AV0021	Randle, Sally	07/15/2001	CHK	80,000.00
<input type="checkbox"/>	214	AV1000	Ford Motor Company	07/15/2001	CHK	200.00
<input type="checkbox"/>	215	AV1010	Bechtel Power Company	07/15/2001	CHK	100.00

[Add Gift](#)

Session Detail page for gift or pledge entry

Information about the session appears, including a total count and amount of the transactions in the session.

Select

Select the check box next to each transaction to mark it for deletion from the session.

Gift Nbr (gift number) or Pledge Nbr (pledge number)

This field displays the number (depending on the type of session you are working with) associated with the transaction.

If you are working in a gift or pledge entry session, click this link to access the Gift Entry or Pledge Entry page where you can update the transaction if the session status is *Open*.

If you are working in a gift or pledge adjustment session, click this link to access the Gift Adjust or Pledge Adjust page, where you can make necessary changes to the transaction.

Gift Date or Pledge Date

Displays the date on which the gift or pledge was made to your institution.

Tender	Displays the tender in which the gift was made. Tender types are defined by your institution on the Tender Types page.
Gift Amount or Pledge Amount	Displays the monetary amount of the gift or pledge.
Delete	Click to remove the selected transactions from the session. All information related to the transaction will be deleted from the session. Deleting within an adjustment session removes the adjustment transaction, but the original gift or pledge transaction remains.
Add Gift or Add Pledge	If you are working with a gift or pledge entry session, click to add additional transactions to the session on the Gift Entry or Pledge Entry page.

Adjusting Gifts and Pledges

You can also use this page to select the donors and gift numbers for the transactions to adjust. Gifts or pledges to be adjusted must first be posted through the GL Interface process. If a transaction needs to be corrected and the session is open or balanced and not yet posted, update the open session or reopen the balanced session and edit the entry. A gift or pledge in a session that is queued must be posted to continue with the adjustment process.

To adjust a gift, enter *AG* in the Session Type field on the Session Filter page when creating a gift adjustment session. To adjust a pledge, enter *AP* in the Session Type field on the Session Filter page when creating a pledge adjustment session. You can then click the Session Details link on either the Gift Adjust or Pledge Adjust pages to access the Session Details page.

Gift Number or Pledge Number	After you enter an ID, enter the gift or pledge number associated with the transaction to adjust. The prompt provides a listing of transactions for the donor that are available for adjustment.
Add Adjustment	Click to add the transaction to the session for adjusting. The Adjust Gift or Adjust Pledge page appears.

Entering Gift and Pledge Payments

This section provides an overview of gift and pledge payments and discusses how to:

- Enter a gift or pledge transaction.
- Enter check information.
- Enter credit card information.
- Enter tribute notification.
- Identify potential matching gifts.
- Apply matching gifts.
- Receive a scheduled pledge.
- Update or add a constituent (person).

- Update or add a constituent (organization).

Understanding Gifts and Pledge Payments

Once you've created a gift session, you can enter gift or pledge payment transactions into the session. You use the Gift Entry page to enter all the basic information pertaining to a transaction. In addition, you can update a donor's record, add a new donor, apply a matching gift, or apply a pledge payment using pages you access through links on the Gift Entry page.

To enter gift payments:

1. Initialize a session with the type of Gift, using the Maintain Sessions page.
See [Chapter 22, "Entering Commitments," Initializing and Balancing the Session, page 374](#).
2. Select session defaults using the Session Defaults page.
See [Chapter 22, "Entering Commitments," Selecting Session Defaults, page 377](#).
3. Enter transactions using the Gift Entry page.
See [Chapter 22, "Entering Commitments," Entering a Gift Transaction, page 381](#).
4. Balance, queue, and post the session.
See [Chapter 23, "Processing Commitments and Analyzing Giving History," Queuing Sessions for Posting, page 426](#) and [Chapter 23, "Processing Commitments and Analyzing Giving History," Processing and Posting Sessions, page 427](#).
5. (Optional) View the accounting lines generated for the gift session.
See [Chapter 23, "Processing Commitments and Analyzing Giving History," Viewing Accounting Lines, page 449](#).

Pages Used to Enter Gifts and Pledge Payments



Page Name	Object Name	Navigation	Usage
Gift Entry	AV_GIFT_ENTRY	Manage Contributor Relations, Enter Commitments, Use, Gift Entry, Gift Entry	Enter gift and pledge payment transactions into a session.
Tender Type Detail	AV_TENDER_DTL_SP	Click the Tender Detail button on the Gift Entry, Membership Entry, Gift Adjustment, or Membership Adjustment page.	Enter specific check information.
Tender Type Detail – Credit Card Entry	AV_CC_PAYMENT_SP	Click the Tender Detail button on the Gift Entry, Membership Entry, Gift Adjustment, or Membership Adjustment page.	Enter detailed credit card information for gift or membership payments.
Tribute	AV_TRIBUTE_SP	Click the Notify link on the Gift Entry page.	Select the IDs of those individuals the donor wants to notify about a tribute gift.
Matching Gifts (14305,54)	AV_MTCH_P_GIFT_SP	Click the Matching Gifts button on the Gift Entry page.	Identify the organizations that might match a donor's gift, and the amount of the potential matches.
Matching Gifts	AV_MTCH_O_GIFT_SP	Click the Matching Gifts button on the Gift Entry page after selecting a gift type of matching gift.	Apply an organization's matching gift payment to a donor's gift.
Pledge Schedule	AV_PLDG_PMT_SP	Click the Pldg Schd link on the Gift Entry page.	Set up a pledge payment schedule that indicates the date and amount of each pledge payment.
Update Information (for people)	AV_UPDATE	Manage Contributor Relations, Manage People, Use, Update a Person's Record, Update Record	To access pages where you can update bio-demographic information, class year, work experience, relationships, and constituent types. You can also access pages to add a new person.
Update Information (for organizations)	AV_UPDATE_ORG	Manage Contributor Relations, Manage Organizations, Use, Update Organization, Update an Organization	To access pages where you can update bio-demographic information, relationships, and constituent types. You can also access pages to add a new organization.

Entering a Gift Transaction

Access the Gift Entry page.

Session Number: 125 Gift Number: 280 Session Count: 1 of 1 Session Amount: 500.00 of 500.00

Gift Detail

  *ID Type: Org *ID: AV2000 Lambert Manufacturing Corporation

*Gift Amount: 500.00 CAD *Tender: CHK *Gift Type: GIFT *Gift Date: 10/22/2001

Base Amount: 344.35 USD Open Pledges Pledge Schedule

Designations View All First 1 of 1 Last

*Business Unit	*Designation	*Campaign	*Appeal Code	*Amount	Charitable Amount
MEDBU	MEDICALBLDG	MED BLDG	ANNUAL	500.00	500.00

Recognition View All First 1 of 1 Last

*ID Type	ID	Constituent	*Recognition	Amount	Anonymous
Org	AV2000	Lambert Manufacturing Corporation	Hard	500.00	<input type="checkbox"/>

Tribute View All First 1 of 1 Last

Tribute Type	ID	Name	Amount	Occasion
In Memory			0.00 USD	

Description: [Maintain Sessions](#) [Session Defaults](#) [Session Details](#)

Gift Entry page

You can enter all the information necessary to store the transaction using this page and the pages accessed through links on this page.

Common Fields



Click to access the Update Information page to either update an existing donor's record or add a new donor to the system.

Since the ID Type field on the Gift Entry page populates by default to *Person*, the page used to add or update a person's record appears by default. To access the page used to add or update an organization's record, select *Org* from the ID Type field, enter the organization's ID, then click the Update Record button.

If you have not entered a donor's ID, you will be prompted to enter one. You can either enter the donor's ID here or leave the prompt set to *NEW*. If you leave the prompt set to New, the system assumes you are adding a new donor and the pages for adding or updating a new donor appear.



Click to view the donor's history of commitments on the Transaction Register page.

After entering an ID, the Transaction Register page appears displaying information pertaining to the donor you selected.

Gift Detail

ID Type

Determine whether the donor is a person or an organization.

ID

Enter the ID number of the donor making the gift. When you enter an ID, the system automatically displays the name and constituent type. It also populates Recognition defaults for the user, including adding a row for any spouse on file.



Access the CR Search page where you can search for a donor.

See [Chapter 13, “Managing Constituent Data,” Using CR Search, page 161](#).

Gift Amt (gift amount)

Enter the total amount of the donation. When you enter a gift amount, the system also populates the Amount and Charitable Amount fields in the Designations area, and also the Recognition and Amount fields in the Recognition area.



If you are entering this session using a currency other than your business unit's base currency, click to access the Display In Other Currency Page where you can view the amount in another currency and obtain exchange rate information.

Tender

Enter the monetary form in which the gift is received. Examples are *Cash*, *CC* (credit card), *CHK* (check), and so on.

The values that display in the prompt box depend upon the values you set up for on the Tender Types page for the setID associated with the business unit for this session.

Tender populates by default to the tender you selected on the Session Defaults page for this session. If you did not select a default tender for the session, this field populates by default to the tender you selected on the CR Business Unit page as a default tender for the session business unit.



If you select a tender type with a special field indicator of *Check*, enter the Check Number on the Tender Type Detail page that appears.

If you select a tender type with a special field indicator of *Credit Card*, enter the constituent's credit card information on the Tender Type Detail page that appears.

See [Chapter 22, “Entering Commitments,” Entering Check or Credit Card Information, page 386](#).

Gift Type

Select the appropriate gift type from the valid gift types at your institution. Delivered gift types are *Gift*, *PP* (pledge payment), *GIK* (gift-in-kind), and *MG* (matching gift). Your institution can define additional gift types.

Important! If you select *PP*, the Pledge field becomes active, so you can enter the number of the pledge associated with this payment.

Matching Gift is only a valid gift type when the donor is an organization.

Pledge

If this transaction is a pledge payment, select the associated pledge from the prompt box.

Gift Date

Enter the date on which the donation is given. This field populates by default to today's date.

Base Amount

If you are entering this session using a currency other than your business unit's base currency, the gift amount for the transaction displays in base currency in this field.

Note. When you save transactions entered in a currency other than your institution's base, the amounts are converted to and stored in base currency. When you view information about these transactions on inquiry pages throughout the system, they display in base currency. However, you can view detail about the transaction currency and exchange rate by accessing the related detail page.

Matching Gifts

If the donor is a person:

Click to identify the organizations that might match this gift. You are prompted to run the matching gifts process. If you choose to proceed, the system populates the Matching Gifts Page with its best guess at possible matches. If you choose to not run the automatic process, a blank Matching Gifts Page appears so you can manually enter an expected matching gift.

If the donor is an organization:

The Matching Gifts button will not appear unless the Gift Type is *MG*.

Important! You must assign designations and hard credit recognition prior to running the Matching Gifts process.

Open Pledges

If there are open pledges for the donor, this link is active. Click to view a list of the donor's outstanding pledges on the Open Pledge Register page.

Pledge Schedule

If there are open pledges for the donor, this link is active. Click to make modifications to the pledge payment schedule on the Pledge Schedule page.

Designations

You can apply donations to designations, or allocation accounts at your institution. For each designation you select, you must associate a specific campaign initiative and appeal. You can add the same designation to a gift, even if its associated campaigns are different.

When you enter this page, the system populates the Designations fields with values set on the Session Defaults page.

Business Unit

Enter the business unit that owns the designation, to which the gift or pledge payment is being allocated. The prompt box contains a list of all the valid business units at your institution, and populates by default to the value you selected from the Business Unit field on the Session Defaults page. When you make a selection, the values in the Designation and Appeal Code prompt boxes change to display the values you defined for the setID associated with this Business Unit. This is a required field.

If you have already selected a designation and appeal, then change the business unit, your selections are backed out.

Designation

Enter the designation to assign. Designations are funds at your institution to which donations and pledges can be allocated.

The values that display in the prompt box include the designations you defined for the setID associated with the business unit you select on this page. The default value is the default designation you selected on the Session Defaults page.

Campaign

Enter a campaign, which is an organized institutional effort targeted to a specific constituency that occurs over a specified period of time with specific purposes and goals. The default value is the default initiative code you selected on the Session Defaults page.

Appeal Code

Enter an appeal code, which is the specific act or item that leads a donor to give, such as a visit, an annual phonathon, a letter, and so on.

The values that display in the prompt box include the appeals you defined for the setID associated with the business unit you select on this page. The default value is the default appeal you selected on the Session Defaults page.

Amount

Enter an amount of the donation to allocate to this designation.

If you are entering gift transactions in a currency other than your business unit's base currency, the currency you selected is depicted on this page. However, for ease of reporting, designation information is stored by the system in base currency.

Charitable Amount

Enter the portion of the designated amount that is tax deductible.

Important! You can split the donation among several designations, but the total allocation must equal 100 percent of the gift amount. The designations you select for a pledge default when you enter payments for that pledge. Additionally, if the Pledge Payment Override Allowed flag is set, the user can edit the designations and recognition entries. If not, these fields fill by default from the pledge records and become unavailable for input.

Recognition

You can indicate which donors to recognize for a particular donation. Recognition can be assigned in the form of hard credit, or soft credits that are defined by your institution, such as memo and vehicle credits.

When your system is set up at your institution, you can define default recognition to split hard and soft credits between a donor and his or her spouse according to your institution's business practices. If these defaults exist, the system populates the Recognition fields.

Amount

Enter an amount of the donation that gives this donor recognition.

If you are entering gift transactions in a currency other than your business unit's base currency, the currency you selected is depicted on this page. However, for ease of reporting, recognition information is stored by the system in base currency.

Important! You can split the recognition among several donors, but the total allocation of hard credit recognition must equal 100 percent of the gift amount. You can assign an unlimited percentage of soft credit for a single transaction.

Tribute

You can enter information about tributes, which are gifts made in honor or in memory of someone.

Tribute Type	Select <i>In Memory</i> or <i>In Honor</i> to indicate whether the tribute is in memory of a deceased individual or in honor of an individual.
Name	Identify the person receiving tribute or memorial recognition. It is not necessary to have an ID in the system to enter tribute and memorial information. If an ID does not exist, enter the person’s name.
Notify	Click to access the Tribute page, where you can attach staff IDs to the tribute. See Chapter 22, “Entering Commitments,” Entering Tribute Notifications, page 388.

Note. No workflow is delivered with the Tribute page.

Important! You cannot save a gift or pledge if the donor’s ID has no constituent type assigned to it, as the CAE report requires a constituent type for each donor. If no constituent type is assigned, the system reminds you to assign one using the Update Record page.

See Also

[Chapter 22, “Entering Commitments,” Updating or Adding a Constituent Who Is a Person, page 391](#)

[Chapter 22, “Entering Commitments,” Updating or Adding a Constituent Who Is an Organization, page 392](#)

Entering Check or Credit Card Information

Access the Tender Type Detail page. This page changes whether you entered *CHK* or *CC* as the tender on the Gift Entry page.

Tender Type Detail

Check Number:2010

Tender Type Detail – Check page

Check Number	If you selected <i>Check</i> as the tender on the Gift Entry page, enter the check number.
--------------	--


Tender Type Detail

Credit Card Information


Enter the information requested exactly as it appears on your credit card.

*First Name:

*Last Name:

*Credit Card Type: 

*Credit Card Number: (ex: 4111-1111-1111-1111)

*Expiration Date:  / (ex: 01 / 2010)

Credit Card Billing Address

The billing address you specify must match your credit card company's records.

Country: [Change Country](#)


Address 1:

Address 2:

Address 3:

City:

County:

State:  California

Postal:

Email Address:

*Telephone:

Tender Type Detail – Credit Card page

First Name	If entering a credit card payment for a person, enter the first name as it appears on the credit card. Include any middle initial after the first name in this field.
Last Name	If entering a credit card payment for a person, enter the last name as it appears on the credit card. Include any suffixes (such as Jr., Sr.) after the last name in this field.
Organization Name	If entering a payment for an organization, enter the organization name.
Credit Card Type	Select the type of credit card the credit card holder is using. These values are set up on the Credit Card Type page. See Chapter 12, “Setting Up Commitment Management,” Defining Credit Card Types, page 142.

Credit Card Number	Enter the credit card holder's card number. The length of the credit card number is established on the Credit Card Type page.
Expiration Date	Enter the expiration month and year as it appears on the credit card.
Email Address	<p>Enter the email address of the credit card holder, including the full domain name, in the form name@host.domain. For authorization and credit transactions, the third-party processor requires a value in this field. Email addresses are defined on the Electronic Addresses page.</p> <p>If you do not have an email address for the contributor, the system uses the default email address you define on the CR Merchants page.</p>
OK	<p>Click to validate any changed information, save, and close the page.</p> <p>If you chose to use the check digit algorithm on the Credit Card Type page, the validation process checks for the appropriate number of digits in the card number. The system also checks for the appropriate prefix for the credit card type and validates the expiration date format, the amount (must be greater than USD 0.00), and the address information. If there are any errors on this page, the system returns a message and prompts for corrections.</p>
Cancel	Click to cancel the entry, ignore any changed information, and close the page without saving.

Entering Tribute Notifications

Access the Tribute page. You enter tribute information on the Gift Entry and Pledge Entry pages, and enter tribute specifics and notifications on this page.

Tribute

☒ In Memory of
 ☐ In Honor of

Name: Gallagher, Shawn
 ID: AV0001

Occasion: Birthday
 Amount: 1,000.00 USD

Notify

View All First 1 of 1 Last

ID		
10001	Chavez, John Joseph	+ -

Tribute page

The ID and Name fields populate by default with the ID and name of the person receiving tribute from the ID field on the Gift Entry page.

- In Memory of**

The system selects this option if you selected *In Memory* in the Tribute Type field on the Gift Entry page.
- In Honor of**

The system selects this option if you selected *In Honor of* in the Tribute Type field on the Gift Entry page.
- Occasion**

This field populates by default with the Occasion field value on the Gift Entry page.
- Amount**

This field populates by default with the amount of the person’s gift or pledge from the Amount field on the Gift Entry page.

Note. No workflow is delivered with this page.

Identifying Potential Matching Gifts

Access the Matching Gifts (14305,54) page.

Matching Gifts (14305,54)

View All

First ◀ 1 of 1 ▶ Last

External Org ID:

AV1000

🔍

+

-

Expected Match Amount:

500.00

Process Dt:

📅

Description:

Employer match

Matching Gifts (14305,54) page

When you click the Matching Gifts button on the Gift Entry page, a dialog box displays asking the system to calculate a “best guess” for potential matching gifts, if you are tracking matching gift rules for organizations. If you click Yes, the fields on this page populate with the system’s best guess. You can also manually enter information about potential matches either by responding No to the best guess question or by inserting rows into this page after the automated calculations have completed and returned this page with expected matches.

- External Org ID**

Identify the organization from which you anticipate a matching gift payment.
- Expected Match Amount**

Enter the amount you expect to receive as a match.
- Process Dt** (process date)

If your institution received a matching gift form from the donor with the gift, enter the gift date. If the form has not been received, leave this field blank. It can be completed on either the Person Matching Gift or External Organization Matching Gift page once the form is received.
- Description**

Enter notes your institution wants to maintain about expected matches such as designation distributions.

Applying Matching Gifts

Access the Matching Gifts page.

Matching Gifts

View All First 1-2 of 2 Last

ID	Name	Exp Mtch Amt	Act Mtch Amt	Match Date
<input checked="" type="checkbox"/> AV0007	Whitney, Christopher	1,500.00 USD	1,500.00 USD	07/24/2001
<input type="checkbox"/> AV0020	Johnson, Shaqua	2,000.00 USD		

Matching Gifts page

When you enter this page, the system displays the ID, Name, and Exp Mtch Amt (expected match amount) of each donor for which the organization is expected to match a gift.

Select

Select the check box for the gift that is being matched by the organization's matching gift payment.

Act Mtch Amt (actual match amount)

Enter the amount the organization is actually matching toward each donor's gift. This field populates by default to the expected match amount but can be overridden.

Match Date

Enter the match date. This field populates by default to today's date but can be overridden.

Receiving a Scheduled Pledge

Access the Pledge Schedule page.

Pledge Schedule

Commitment Amount: 2,400.00 USD

View All First 1-5 of 5 Last

Select	*Expected Date	Expected Amount	Received Date	Received Amount	Notification Sent
<input type="checkbox"/>	01/01/2002	2,000.00	07/20/2001	500.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	01/02/2002	1,500.00	07/23/2001	400.00	<input type="checkbox"/>
<input type="checkbox"/>	01/03/2002	100.00		0.00	<input type="checkbox"/>
<input type="checkbox"/>	01/05/2002	500.00		0.00	<input type="checkbox"/>
<input type="checkbox"/>	01/06/2002	900.00		0.00	<input type="checkbox"/>

Payments Received: 900.00

Pledge Schedule page

Select	Select if you have received the gift. The Expected Date and Expected Amount fields become unavailable for input.
Expected Date	Enter the date on which you expect to receive the pledge payment.
Expected Amount	Enter the pledge payment amount you expect to receive.
Received Date	Enter the date on which a pledge payment is received.
Received Amount	Enter the monetary amount of a pledge payment.
Notification Sent	Select to indicate that a notification of the scheduled pledge payment has been sent.

Updating or Adding a Constituent Who Is a Person

Access the Update Information page.

EmpID: AV0001 **Gallegher, Shawn**

Update Information

Demographic and Address Data

- [Biodemo/Address](#)
- [Names](#)
- [Class Year](#)
- [Work Experience](#)

Relationship Data

- [Person Relationship](#)
- [Organization Relationship](#)

Constituent Data

- [Constituent Types](#) [Involvement](#)

Add New Constituent

- [Add Person](#) [Add Organization](#)

Update Information page – Person page

You can use the Update Information pages to either update an existing donor's record or add a new donor to the system. There is an Update Information page for donors who are people, and an Update Information page for donors who are organizations.

Note. When you access this page through a session, the page that displays when you click the Update Record button depends upon the ID type you selected for the transaction.

Demographic and Address Data

Biodemo/Address	Click to access the Bio/Demo data component to update a person's name, address, biographic, and ethnicity information.
Names	Click to access the Names page where you can update information about the various names for a constituent.

Class Year Click to access the Preferred Class Year and Internal Legacy Degree pages. You can update information about a constituent's preferred class year and any internal degrees.

Work Experience Click to access the Work Experience page where you can update information about a constituent's employment history.

Relationship Data

Person Relationship Click to access the Relationships component where you can update information about a constituent's relationships with other people in the system.

Organization Relationship Click to access the Person/Org Relationships page where you can update information about a constituent's relationships with organizations in the system.

Constituent Data

Constituent Types Click to access the Constituent Type page where you can update information about the constituent types assigned a constituent. Constituent types are the relationships the constituent has with your institution.

Involvement Click to access the Involvement page where you can update information about the constituent's interests, activities, affiliations, and awards and honors.

Add New Constituent

Add Person Click to access the Bio/Demo data component in add mode. You can add a new person's record to the system. Leave the ID field set to *NEW* to assign the next available sequential ID number to the person.

Updating or Adding a Constituent Who Is an Organization

Access the Update Information page.

Org ID:	AV1000	Ford Motor Company
Update Information		
Demographic and Address Data		
Organization Data/Address Organization Locations Organization Departments Organization Contacts		
Relationship Data		
Person Relationship Organization Relationship		
Constituent Data		
Constituent Types Involvement		
Add New Constituent		
Add Person Add Organization		

Update Information page – Organization page

Demographic and Address Data

- Organization Data/Address** Click to access the component where you can update an organization's description, organization type, and primary location information.
- Organization Locations** Click to access the component where you can update information about an organization's other locations, phone numbers, and email addresses.
- Organization Departments** Click to access the component where you can update an organization's departments, department locations, and department email addresses.
- Organization Contacts** Click to access the component where you can update information about an organization contact, the contact's location, and the contact's email addresses.

Relationship Data

- Person Relationship** Click to access the Org/Person Relationships page where you can update information about a constituent's relationships with people in the system.
- Organization Relationship** Click to access the Relationships page where you can update information about a constituent's relationships with other organizations in the system.

Constituent Data

- Constituent Types** Click to access the Organization Financial Info page where you can update information about the constituent type assigned to the organization. A constituent type is the relationship the constituent has with your institution. You can also update other information pertaining to the organization's financial status on this page.

Involvement

Click to access the Involvement page where you can update information about the constituent's interests, activities, affiliations, and awards and honors.

Add New Constituent**Add Organization**

Click to access the component used to add an organization in add mode. You can add a new organization's record to the system. Leave the ID field set to *NEW* to assign the next available sequential ID number to the organization.

Loading Mass Gift and Pledge Transactions

This section discusses how to load large volumes of gift and pledge transactions.

Page Used to Load Transactions

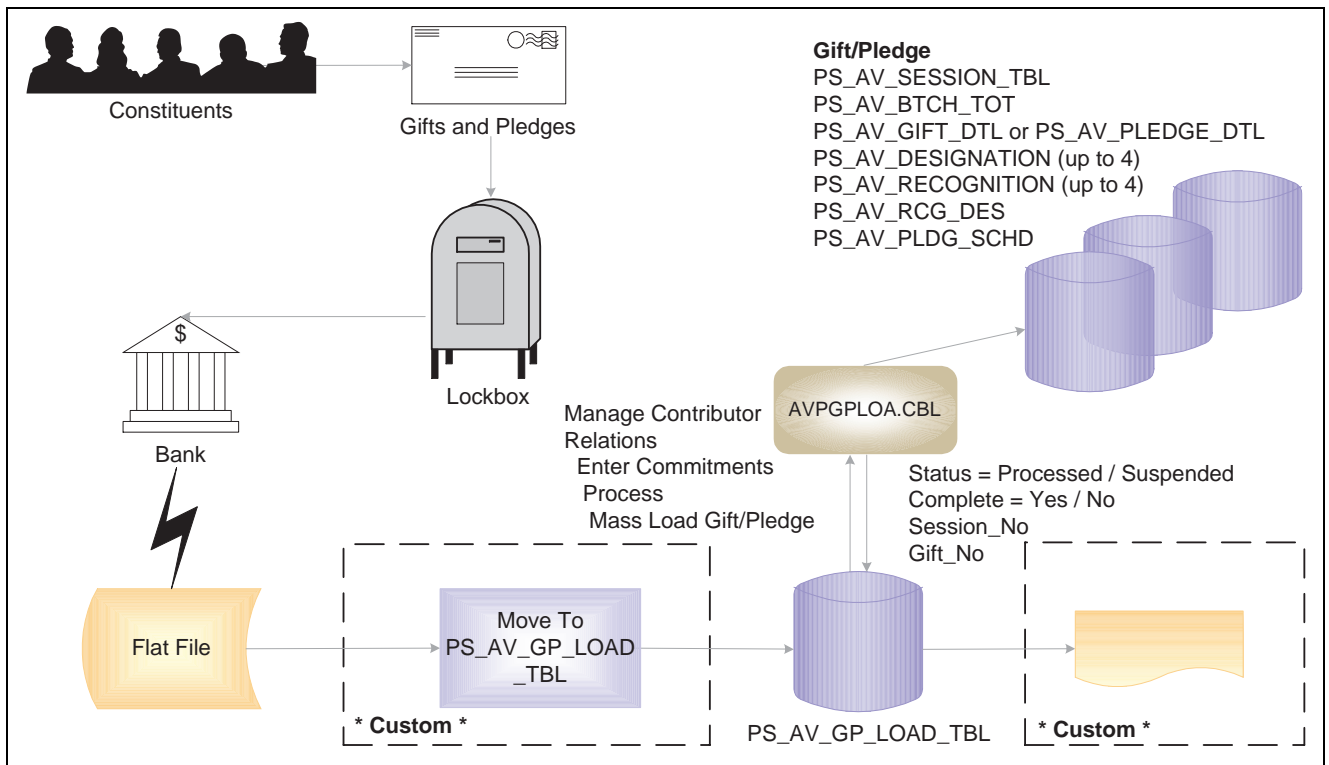
Page Name	Object Name	Navigation	Usage
Mass Load Gift/Pledge	AV_RUN_CNTL	Manage Contributor Relations, Enter Commitments, Process, Mass Load Gift/Pledge, Mass Load Gift/Pledge	Enables you to enter groups of gift and pledge transactions into your system. For example, this process can be used to load lockbox transactions.

Loading Gifts and Pledges

The AVPGPLOA (COBOL) process takes all the information placed in the AV_GP_LOAD_TBL and moves it into the appropriate tables in your system. Gifts or pledges to be loaded can contain up to four designation records and four recognition records.

Because of the many variances between financial institutions and their databases, PeopleSoft does not deliver an API to populate the AV_GP_LOAD_TBL. The following diagram shows how the program might be incorporated into a lockbox process and which parts of that process are created and customized by your institution.

Note. This section contains updated information that was posted to Customer Connection in April 2003.



How GP Load might fit into a lockbox process at your institution

Access the Mass Load Gift/Pledge page.

Mass Load Gift/Pledge

Run Control ID: PS [Report Manager](#) [Process Monitor](#) **Run**

***Business Unit:** MEDBU Medical Business Unit

***Institution:** PeopleSoft University

***Commit Level:** 100

Mass Load Gift/Pledge page

Business Unit

Enter the business unit for which you want to run the process.

Institution

Once you enter a business unit, the system automatically populates the institution to which the transactions are processed.

Commit Level

Enter a commit level equal to the number of transactions to be loaded into a single session. If the number of transactions to be loaded exceeds the commit level, the system creates multiple sessions.

When you click the Run button, the system does the following:

1. Where AV_SESS_TYPE = 'G', creates gift records in the AV_GIFT_DTL, AV_DESIGNATION, and AV_RECOGNITION tables.

Note. Gifts processed through AVPGPLOA must be original and nonadjusted, and cannot be tied to a pledge or matching gift.

2. Where AV_SESS_TYPE = 'PL', creates pledge records in the AV_PLEDGE_DTL, AV_DESIGNATION, AV_RECOGNITION, and AV_PLDG SCHD tables.

Note. Pledges processed through AVPGPLOA must be original, nonadjusted pledges with no payment activity.

3. For all gifts and pledges, brings the appropriate underlying information into the process, including Constituent Type, Alumnus Type, and Designation type and purpose.
4. Creates the AV_RCG_DES record after processing all gift and pledge records.
5. After processing the final gift or pledge record, updates the DESCR254 field on the AV_GP_LOAD_TBL with the results, including the suspense reason, if applicable.
6. Sets the COMPLETE_FLAG to 'Y' and the GP_LOAD_STATUS to 'P' for processed or 'S' for suspended.
7. Writes the SESSION_NO and GIFT_NO for each specific gift and pledge back to the AV_GP_LOAD_TBL for reference.
8. Leaves the generated sessions open for review prior to balancing, queuing, and posting.

Warning! Do not enter pledge payments through this process. You must enter them through the online process to ensure that the system updates the pledge records and pledge schedules.

Process Scheduler runs the Mass Load Gift/Pledge process at user-defined intervals.

See Also

Customer Connection: Support: Documentation: Documentation Updates: Student Administration: Contributor Relations: "PeopleSoft 8SP1 Contributor Relations: Loading Mass Gift and Pledge Transactions"

Viewing Gift Session Transactions

Once you have created a session containing gifts and pledge payments, you can view information about the transactions in your sessions. If you are a supervisor and have security access, you can view information about gifts regardless of whose session they reside in.

This section discusses how to:

- View a gift summary.
- View gift details.
- View a supervisor's gift session summary.

Pages Used to View Gift Session Transactions

Page Name	Object Name	Navigation	Usage
Gift Summary	AV_GIFT_SMRY	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Inquire2, Gift Summary, Gift Summary • Manage Contributor Relations, Enter Commitments, Inquire2, Supervisor Gift Summary, Supervisor Gift Summ 	View information about the gifts and pledge payments you enter in a session. You can only view information contained in sessions you currently control, unless you are a supervisor in the system.
Gift Detail	AV_GIFT_DTL_SP	<ul style="list-style-type: none"> • You can access the Gift Detail page through multiple navigation paths. The list below contains the most frequently used paths. • Click the Details link on the Gift Summary page. • Click the Details link on the Supervisor Gift Summ page. 	View detailed information about a particular gift or pledge payment transaction.
Designation Detail	AV_DES_DTL_PNL	<ul style="list-style-type: none"> • You can access the Designation Detail page through multiple navigation paths. Below is the most frequently used path. • Click the Designation button on the Gift Detail page. 	View detailed information about the designations assigned to a particular transaction.
Recognition Detail	AV_RECG_DTL_SP	<ul style="list-style-type: none"> • You can access the Recognition Detail page through multiple navigation paths. Below is the most frequently used path. • Click the Recognition button on the Gift Detail page 	View detailed information about the recognition given for a particular transaction.
Matching Gift Detail	AV_MTCH_GIFT_SP	<ul style="list-style-type: none"> • You can access the Matching Gift Detail page through multiple navigation paths. Below is the most frequently used path. • Click the Matching Gifts button on the Gift Detail page. 	View detailed information about the potential matching gifts for a transaction.

Page Name	Object Name	Navigation	Usage
Supervisor Gift Summ (supervisor gift summary)	AV_GIFT_SMRY	<ul style="list-style-type: none"> Manage Contributor Relations, Enter Commitments, Inquire2, Gift Summary, Gift Summary Manage Contributor Relations, Enter Commitments, Inquire2, Supervisor Gift Summary, Supervisor Gift Summ 	View information about the gifts and pledge payments staff members enter in sessions.

Viewing a Gift Summary

Access the Gift Summary page.

Gift Summary

Business Unit: MEDBU
Session Nbr: 105
Institution: PSUNV

Status: Open
Last Mod Date: 07/24/2001
User ID: PS

Date Opened: 07/24/2001
Balance Date:
Post Date:

Total Count: 1
Total Amount: 3,500.00 USD

View All First 1 of 1 Last

Select	Gift Nbr	Gift Date	ID	Constituent	Details
1 <input type="checkbox"/>	222	07/24/2001	AV1012	American Enrichment Foundation	Details

Add Gift Edit Gift

Gift Summary page

If your role is a GPS, you may want to view information about the gifts and pledge payments your staff enters into sessions. You can view session information by Operator ID and Session Number.

Details Click to view detailed information about a particular gift or pledge payment on the Gift Detail page.

Add Gift If the gift session you selected is open, click to add an additional gift to the session.

Select and Edit Gift If the gift session you selected is open, select the check box next to a gift and click the Edit Gift button to make changes to an existing gift.

See Also

Chapter 22, "Entering Commitments," Entering a Gift Transaction, page 381

Viewing Gift Details

Access the Gift Detail page.

Click the Designation button to view detailed information about the designations for this donation. The Designation Detail page appears.

Click the Recognition button to view detailed information about the recognition for this donation. The Recognition Detail page appears.

Click the Matching Gifts button to view detailed information about the expected matching gifts for this donation. The Matching Gift Detail page appears.

Viewing a Supervisor's Gift Session Summary

When you open the Supervisor Gift Summ page, you can select the user ID or session about which to view information. The gift number, gift date, and gift amount appear for each transaction in the session you selected. The page also contains a check box that indicates whether or not the gift session is connected to online giving.

See Also

Chapter 22, "Entering Commitments," Entering a Gift Transaction, page 381

Adjusting Gifts

This section provides an overview of gift adjustment and discusses how to enter gift adjustment transactions.

Understanding Gift Adjustment

You can create gift adjustment sessions, or groups of transactions that correct existing transactions. Once an adjustment session is opened, you can select the existing transactions to adjust, then make the necessary changes.

When you create an adjustment transaction, a sequence number is created to indicate that there have been multiple actions on a particular gift number. For example, the initial entry is sequence 1 on AV_GIFT_DTL; the adjusted entry is sequence 2 on the ADJ_GIFT_DTL table; and the corrected entry is sequence 3 on the AV_GIFT_DTL table.

Note. Adjusted transactions negate the original transaction and create a new transaction record, so enter adjustment amounts just as you would if entering the original transaction.

To adjust gift transactions:

1. Initialize a session with the type of Adjust Gift, using the Maintain Sessions page.

See Chapter 22, "Entering Commitments," Initializing and Balancing the Session, page 374.

2. Select session defaults using the Session Defaults page.

See Chapter 22, "Entering Commitments," Selecting Session Defaults, page 377.

3. Select the existing posted transactions to adjust using the Session Detail page.

See [Chapter 22, “Entering Commitments,” Viewing Session Details and Selecting Transactions to Edit or Delete, page 378.](#)

4. Make the necessary changes to transactions using the Gift Adjust page.

See [Chapter 22, “Entering Commitments,” Entering a Gift Adjustment Transaction, page 400.](#)

5. Balance, queue, and post the session.

See [Chapter 22, “Entering Commitments,” Initializing and Balancing the Session, page 374;](#) [Chapter 23, “Processing Commitments and Analyzing Giving History,” Queuing Sessions for Posting, page 426](#) and [Chapter 23, “Processing Commitments and Analyzing Giving History,” Processing and Posting Sessions, page 427.](#)

Page Used to Adjust Gifts

Page Name	Object Name	Navigation	Usage
Gift Adjust	AV_ADJ_GIFT	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Use, Gift Adjustment, Gift Adjust • Click a Gift Nbr on the Session Detail page. 	Adjust an existing gift transaction you selected on the Session Detail page.

Selecting a Transaction to Adjust

Use the Session Detail page to choose a gift or pledge to adjust.

See [Chapter 22, “Entering Commitments,” Viewing Session Details and Selecting Transactions to Edit or Delete, page 378.](#)

Entering a Gift Adjustment Transaction

Access the Gift Adjust page.

Important! The original transaction must be posted before you can adjust it.

Gift Adjust

Session Nbr: 76

Gift Nbr: 142

Session Count: 1 of 2

Session Amount: 30,000.00 of 500.00

Gift Detail

ID: AV0034

Mirmow,Leland

Student

*Reason:

Data entry error

☐ Refund

Gift Amount:

30,000.00

USD

*Tender:

CHK

*Gift Type:

GIFT

Gift Date:

08/01/2001

Matching Gifts

[Open Pledges](#) Pldg Schd

Designations

[View All](#) First 1 of 2 Last

*Business Unit

PSUNV

Designation

EVERETTSCH

*Campaign

ANNFUND

Appeal Code

ANNUAL

Amount

10,000.00

Charitable Amount

10,000.00

Recognition

[View All](#) First 1 of 1 Last

*ID Type

Person

ID

AV0034

Constituent

Mirmow,Leland

Type

Student

*Recognition

H

Amount

30,000.00

Anonymous

☐

Tribute

[View All](#) First 1 of 1 Last

Tribute Type

In Memory

ID

Name

Amount

Occasion

Description:

[Balance Session](#)

[Session Defaults](#)

[Session Details](#)

Gift Adjust page

Important! Adjusted transactions negate the original transaction and create a new transaction record, so enter adjustment amounts just as you would if entering the original transaction.

If the Currency Code you selected for this session on the Maintain Sessions page differs from your business unit’s base currency, two new page controls display on this page.

Currency Code	Fields That Display	Fields That Hide
Your Business Unit’s Base		Display in Other Currency button
		Base Amt
Any Other Currency	Display in Other Currency button	
	Base Amt	

Reason

You must select a reason for the adjustment. Reasons are defined by your institution, and describe the reason why an adjustment is made.

Refund

Select if the gift adjustment results in a refund to the donor.

If this check box is selected, when you run the GL Interface process on this adjustment session, the system creates a row in the CR Holding Account that indicates the donor is owed a refund.

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401

Click the links at the bottom of this page to access the Maintain Sessions, Session Defaults, and Session Details pages, where you can view information about the session that contains the adjusted transaction.

See Also

Chapter 22, “Entering Commitments,” Entering a Gift Transaction, page 381

Adjusting Gift and Membership Credit Card Payments

To adjust gift and membership credit card payments, open a gift or membership adjustment session and make the necessary changes.

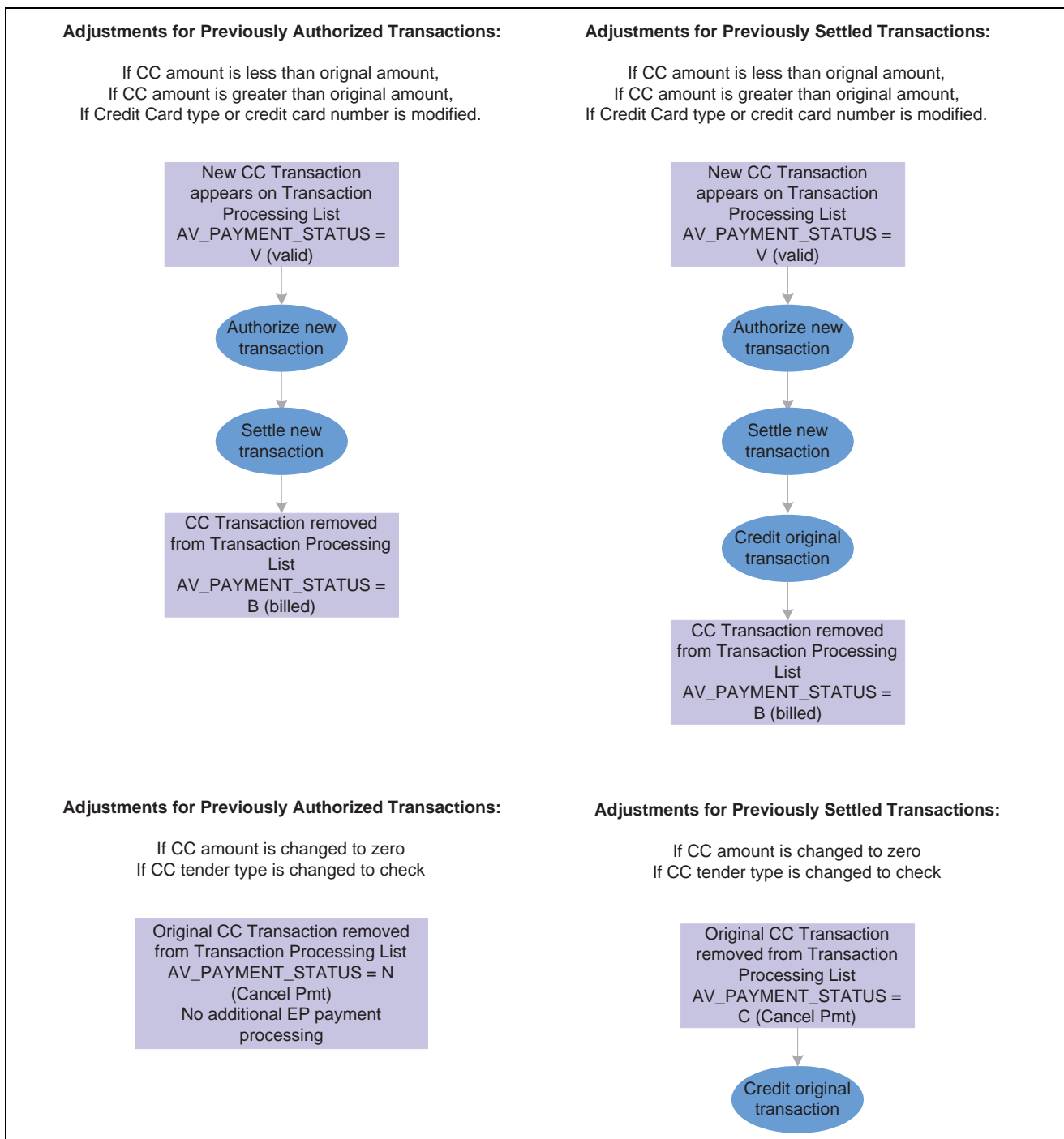
However, any time you change credit card information, you must revalidate, reauthorize, and resettle the transaction. You also need to credit the original gift amount.

To reauthorize and credit adjusted transactions:

1. Authorize the new gift amount using the EP Transaction Processing – Filter Options page and EP Transaction Processing – Transaction List page.
2. Filter transactions for a Transaction Requested value of *Credit* on the EP Transaction Processing – Filter Options page.
3. Credit the original gift amount on the EP Transaction Processing – Transaction List page.

Once you refund a transaction, its status becomes *C*.

The following graphic illustrates the gift and membership credit card transaction adjustment process described above.



Summary of credit card adjustment process

See Also

Chapter 22, “Entering Commitments,” Adjusting Gifts, page 399

Chapter 23, “Processing Commitments and Analyzing Giving History,” Processing Credit Card Transactions, page 436

Entering Conditional Pledges

This section gives an overview of conditional pledges and discusses how to:

- Enter conditional pledge detail.
- Assign conditional pledge designations.
- Assign conditional pledge recognition.

Understanding Conditional Pledges

You can create conditional pledges, which hold pledge information that only becomes valid once particular conditions are met. For example, if Shawn Gallegher pledges USD 40,000 to your 2000 Fund campaign, but will only give that amount once you have raised USD 2,000,000, his pledge is conditional. You can transfer the information you enter about conditional pledges to the actual pledge transaction once the conditions are met and the pledge is activated.











Important! Once a conditional pledge becomes an actual pledge, the conditional pledge information remains stored in the system, but does not display on summary pages or in Conditional Pledge fields. Because the information remains stored, you can revert to the conditional pledge if you delete the actual pledge.

Pages Used to Enter Conditional Pledges

Page Name	Object Name	Navigation	Usage
Cond Pledge Entry (conditional pledge entry)	AV_CP_ENTRY, AV_CP_ENTRY_E, AV_CP_ENTRY_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Use, Conditional Pledges, Cond Pledge Entry • Manage Contributor Relations, Enter Commitments, Use, Conditional Pledges-Org, Cond Pledge Entry • Manage Contributor Relations, Enter Commitments, Workset, Conditional Pledges, Cond Pledge Entry 	Enter basic information about a conditional pledge.
Cond Pledge Designations (conditional pledge designations)	AV_CP_ENTRY2, AV_CP_ENTRY2_E, AV_CP_ENTRY2_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Use, Conditional Pledges, Cond Pledge Designations • Manage Contributor Relations, Enter Commitments, Use, Conditional Pledges-Org, Cond Pledge Designations • Manage Contributor Relations, Enter Commitments, Workset, Conditional Pledges, Cond Pledge Designations 	Apply a conditional pledge to designations, or allocation accounts at your institution.
Cond Pledge Recognition (conditional pledge recognition)	AV_CP_ENTRY3, AV_CP_ENTRY3_E, AV_CP_ENTRY3_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Use, Conditional Pledges, Cond Pledge Recognition • Manage Contributor Relations, Enter Commitments, Use, Conditional Pledges-Org, Cond Pledge Recognition • Manage Contributor Relations, Enter Commitments, Workset, Conditional Pledges, Cond Pledge Recognition 	Indicate which donors to recognize for a particular conditional pledge.

Entering Conditional Pledge Detail

Access the Cond Pledge Entry page.

Cond Pledge Entry		Cond Pledge Designations		Cond Pledge Recognition	
Gallegher, Shawn		ID:	AV0001		  
Constituent Type: Alumni		Yr:	2001		Institution: PSUNV
<div style="text-align: right;">View All First 1 of 1 Last</div>					
Pledge Nbr:	NEW		*Status:	Active   	
Pledge Amt:	<input type="text" value="0.00"/>		USD		
Effective Date:	<input type="text" value="07/24/2001"/> 				
*Payment Schedule:	<input type="text" value="S-Annual"/> 				
*First Payment Date:	<input type="text" value="07/24/2001"/> 				
*Fulfillment Date:	<input type="text"/> 				
Description:	<input type="text"/>				

Cond Pledge Entry page

This page holds information about the commitment amount and the initial pledge payment schedule.

Pledge Amt (pledge amount) Enter the total monetary amount of the commitment.

Payment Schedule Indicate the increments of time in which pledge payments will be made. Examples are *Annual*, *Monthly*, and so on.

The values are for this field are delivered with your system as translate values. Do not modify these translate values in any way. Any modifications to these values will require a substantial programming effort.

First Payment Date Enter the date on which you expect the first payment to be made for this conditional pledge.

Fulfillment Date Enter the date on which the final payment for the pledge will be made.

Assigning Conditional Pledge Designations

Access the Cond Pledge Designations page.

Cond Pledge Designations page

You can apply percentages or amounts of a donation or pledge to multiple designations at your institution. For each designation select, you can associate a specific campaign and appeal.

Des BU (designation business unit)

Enter the business unit that owns the designation to which the conditional pledge is being allocated. The prompt box contains a list of all the valid business units at your institution. When you make a selection, the values in the Designation and Appeal prompt boxes change to display the values you defined for the setID associated with this Business Unit.

If you have already selected a designation and appeal, then change the business unit, your selections are backed out.

Designation

Assign designations, which are the projects, funds, or areas at your institution that receive appropriation from gift transactions. Designations are linked to specific item types in your institution's financial structure.

The values that display in the prompt box include the designations you defined for the setID associated with each designation business unit. The default value is the default designation you set up when you defined user defaults.

Campaign

Assign a campaign, which is an organized institutional effort targeted to a specific constituency that occurs over a specified period of time with specific purposes and goals.

Appeal

Assign appeals, which are the specific acts or items that lead a donor to give, such as the annual phonathon, a campaign letter, and so on.

The values that display in the prompt box include the appeals you defined for the setID associated with the Business Unit you select on this page. The default value is the default appeal you set up when you defined user defaults.

Pct (percent) and Amount

Enter the percentage of the pledge to allocate to this designation. When you enter a percentage, the amount of the gift equaling that percent displays in the Amount field.

Alternatively, enter an amount of the donation or pledge to allocate to this designation. When you enter an amount, the percent of the gift or pledge equaling that amount displays in the Pct field.

Assigning Conditional Pledge Recognition

Access the Cond Pledge Recognition page.

The screenshot shows the 'Cond Pledge Recognition' page. At the top, there are three tabs: 'Cond Pledge Entry', 'Cond Pledge Designations', and 'Cond Pledge Recognition'. The 'Cond Pledge Recognition' tab is selected. Below the tabs, the page displays the following information:

- Constituent:** Gallegher, Shawn
- ID:** AV0001
- Yr:** 2001
- Institution:** PSUNV

Below this information, there is a section for 'Pledge Nbr: NEW' with a 'Use Default Recognition' button. Underneath, a 'Recognition Hard Credit Total' section shows 'Pct: 100.0000' and 'Amt: 0.00'. The main 'Recognition' section contains the following fields:

- *ID Type:** Person (dropdown menu)
- ID:** AV0001 (text field with a search icon)
- *Recognition Type:** Hard Credit (dropdown menu)
- Recognition Pct:** 100.0000 (text field)
- Amount:** 0.00 (text field)

Navigation links at the top right of the Recognition section include 'View All', 'First', '1 of 1', and 'Last'. There are also '+' and '-' buttons next to the *ID Type field.

Cond Pledge Recognition page

Recognition can be assigned in the form of hard credit, or soft credits that are defined by your institution such as memo and vehicle credits.

Use Default Recognition

Click to use the institution default recognition as defined on the CR Installation page. The system then populates Recognition fields with both the donor and spouse IDs based on the institution default.

See [Chapter 2, "Setting Up Your PeopleSoft Contributor Relations Framework," Defining User Defaults, page 7.](#)

Recognition Type

Select the type of credit the donor is receiving, such as *Hard Credit*, *Soft Credit*, *Vehicle Credit*, and so on. Recognition types are defined by your institution, but always contain at least one type of hard credit and one type of soft credit.

Recognition Pct (recognition percent)

Enter the percentage of the pledge to allocate to this designation. When you enter a percentage, the amount of the gift equaling that percent displays in the Amount field.

Alternatively, enter an amount of the donation or pledge to allocate to this designation. When you enter an amount, the percent of the gift or pledge equaling that amount displays in the Pct field.

Important! Pledge recognition is not actually assigned until pledge payments are received. The recognition you select for a pledge defaults when you enter payments for that pledge. You can assign an unlimited percentage of soft credit for a single transaction.

When a conditional pledge is activated in a pledge session, the Pledge Entry page populates recognition directly from the conditional pledge record. Therefore, if spouse recognition does not exist on the conditional pledge, it does not appear by default in the Pledge Entry page.

Entering Pledges

This section provides an overview of pledges and discusses how to:

- Enter a pledge transaction.
- Determine a pledge payment schedule within a session.
- Adjust a pledge payment schedule for a constituent.

Understanding Pledges

Once you create a pledge session, you can enter pledge transactions into the session. You use the Pledge Entry page to enter all the basic information pertaining to a transaction. In addition, you can update a donor's record, add a new donor, and create a pledge schedule using pages you access through links on the Pledge Entry page.

To enter pledge transactions:

1. Initialize a session with the type of Pledge, using the Maintain Sessions page.
See [Chapter 22, “Entering Commitments,” Initializing and Balancing the Session, page 374](#).
2. Select session defaults using the Session Defaults page.
See [Chapter 22, “Entering Commitments,” Selecting Session Defaults, page 377](#).
3. Enter transactions using the Pledge Entry page.
See [Chapter 22, “Entering Commitments,” Entering Pledges, page 409](#).
4. Balance, queue, and post the session.
See [Chapter 22, “Entering Commitments,” Entering Pledges, page 409](#); [Chapter 23, “Processing Commitments and Analyzing Giving History,” Queuing Sessions for Posting, page 426](#) and [Chapter 23, “Processing Commitments and Analyzing Giving History,” Processing and Posting Sessions, page 427](#).
5. (Optional) View the accounting lines generated by the pledge, if the pledge was fed to the general ledger.
See [Chapter 23, “Processing Commitments and Analyzing Giving History,” Viewing Accounting Lines, page 449](#).

Pages Used to Enter Pledges

Page Name	Object Name	Navigation	Usage
Pledge Entry	AV_PLEDGE_ENTRY	Manage Contributor Relations, Enter Commitments, Use, Pledge Entry, Pledge Entry	Enter pledge transactions into the system.
Pledge Schedule	AV_PLDG_SCHD	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Use, Pledge Adjustment, Payment Schedule Adjust • Manage Contributor Relations, Enter Commitments, Use, Pledge Entry, Pledge Schedule 	Determine a pledge payment schedule that indicates the date and amount of each pledge payment.
Pledge Schedule	AV_PLDG_SCHD_ADJ, AV_PLDG_SCHD_ADJ_E	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Use, Pledge Adjustment, Payment Schedule Adjust • Manage Contributor Relations, Enter Commitments, Use, Pledge Entry, Pledge Schedule 	Update the date and amount of anticipated pledge payments for existing pledges.

Entering a Pledge Transaction

Access the Pledge Entry page.

Pledge Entry **Pledge Schedule**

Session Number: 155 Pledge Number: NEW Session Count: 0 of 2 Session Amount: 0.00 of 500.00

Conditional Pledge Information [View All](#) First 1 of 1 Last

Convert to Pledge	Conditional Pledge Number	Conditional Pledge Amount	Effective Date	First Payment Date	Fulfillment Date
Convert to Pledge	199	25,000.00 USD	07/30/2001	12/31/2001	12/31/2001

Pledge Detail

ID Type: Person ID: SAC0004 Gonzalez, Mark Friend

*Pledge Amount: 5,000.00 USD *Effective Date: 10/11/2002 *Payment Schedule: S-Annual *First Payment Date: *Fulfillment Date: ☐ Feed Pledge

Designations [View All](#) First 1 of 1 Last

*Business Unit	*Designation	*Campaign	*Appeal Code	*Amount
GLAKE	ALUMNILIFE	MAIN		5,000.00

Recognition [View All](#) First 1 of 2 Last

ID Type	ID	Constituent	*Recognition	*Amount	Anonymous
Person	SAC0004	Gonzalez, Mark	Hard	5,000.00	<input type="checkbox"/>

Tribute [View All](#) First 1 of 1 Last

Tribute Type	ID	Name	Amount	Occasion
In Memory			0.00 USD	Notify

Description: [Maintain Sessions](#) [Session Defaults](#) [Session Details](#)

Pledge Entry page

You can enter all the information necessary to store the transaction using this page and the pages accessed through links on this page.

Pledge Detail

Pledge Amt (pledge amount) Enter the total monetary amount of the commitment.

Pmt Schd (payment schedule) Indicate the increments of time in which pledge payments will be made, such as *Annual*, *Monthly*, and so on. When you select a payment schedule, the system divides the total commitment amount into equal payments for each increment between the effective date and the fulfillment date. You can view information about each pledge payment, and make adjustments to the schedule on the Pledge Schedule page.

The values for this field are delivered with your system as translate values. Do not modify these translate values in any way. Any modifications to these values will require a substantial programming effort.

First Pmt Dt (first payment date) Enter the date on which the first pledge payment for this pledge is expected to be made.

Fulfillment Date Enter the date on which the final payment for the pledge will be made.

Note. When you save a pledge, the system builds an initial pledge payment schedule using the first payment and fulfillment dates and payment schedule you select to calculate payment dates and amounts.

Feed Pledge If your institution has enabled the pledge feed feature on the CR Installation page, select the check box to include the pledge in the GL Interface process for recording the pledge in your institution’s financial system as a receivable.

Conditional Pledge Information

If a donor has made a conditional pledge, you can convert that pledge to an actual pledge. These fields display upon entering a donor’s ID if the donor has an active conditional pledge recorded.

Convert to Pledge Click the Convert to Pledge button to convert the donor’s conditional pledge to an actual pledge. When you click this button, the remaining fields on this page populate by default to the values set up for the conditional pledge.

Note. You will have the option to deactivate the conditional pledge once you have attached it to an actual pledge in Pledge Entry.

CP Nbr (conditional pledge number) Displays the system generated number associated with the donor’s conditional pledge.

CP Amount (conditional pledge amount) Displays the monetary amount of the donor’s conditional pledge, but can be overwritten.

First Payment Date Displays the date on which the donor plans to make the first payment on the pledge, but can be overwritten.

Fulfillment Date Displays the date on which the donor plans to fulfill the pledge, but can be overwritten.

Designations

You can apply pledges to designations, or allocation accounts at your institution. For each designation you select, you must associate a specific campaign initiative and appeal. You can add the same designation to a gift, even if its associated campaigns are different.

Business Unit Enter the business unit that owns the designation to which the pledge is being allocated. The prompt box contains a list of all the valid business units at your institution, and populates by default to the value you selected from the business unit field on the Session Defaults page. When you make a selection, the values in the Designation and Appeal prompt boxes change to display the values you defined for the setID associated with this business unit.

If you have already selected a designation and appeal, then change the business unit, your selections are backed out.

Designation Enter the designation to assign. Designations are funds at your institution to which donations and pledges can be allocated.

The values that display in the prompt box include the designations you defined for the setID associated with the business unit you select on this page. The default value is the default designation you selected on the Session Defaults page.

Campaign

Enter a campaign from the prompt box containing all the campaign initiatives defined at your institution. A campaign is an organized institutional effort targeted to a specific constituency that occurs over a specified period of time, with specific purposes and goals. The default value is the default initiative code you selected on the Session Defaults page.

Appeal Code

Enter an appeal code, which is the specific act or item that leads a donor to give, such as a visit, an annual phonathon, a letter, and so on.

The values that display in the prompt box include the appeals you defined for the setID associated with the business unit you select on this page. The default value is the default appeal you selected on the Session Defaults page.

Amount

Enter an amount of the pledge to allocate to this designation.

Important! You can split the donation among several designations, but the total allocation to designations must equal 100 percent. The designations you select for a pledge default when you enter payments for that pledge.

Recognition

You can indicate donors to recognize for a particular pledge. Recognition can be assigned in the form of hard credit, or soft credits that are defined by your institution, such as memo and vehicle credits.

When your system is set up, you can define default recognition to split hard and soft credits between a donor and his or her spouse, according to your business practices. If these defaults exist, recognition records are created by the system, and you can update them as necessary.

Important! You can split the recognition among several donors, but the total allocation of hard credit recognition must equal 100 percent of the pledge amount. You can assign an unlimited percentage of soft credit for a single transaction.

Tribute

You can enter information about tribute or memorial recognition for a pledge.

Tribute Type

Select *In Memory* or *In Honor* to indicate whether the tribute is in memory of a deceased individual or in honor of an individual.

ID and Name

Enter either the name or ID of the person receiving tribute or memorial recognition. It is not necessary to have an ID in the system to enter tribute and memorial information. If an ID does not exist, enter the person's name.

Amount

The amount of the pledge populates by default, but you can change this.

Occasion

Describe the occasion that triggered this type of recognition. For example, the donor could be setting up a Memorial Scholarship in a deceased individual's name.

See Chapter 22, “Entering Commitments,” Entering Tribute Notifications, page 388.

Determining a Pledge Payment Schedule Within a Session

Access the Pledge Schedule page.

Pledge Entry

Pledge Schedule

Session Nbr: 74

Pldg Nbr: 167

ID: AV0005Martino, Bernard

Duration: 1 year 1 day

Fulfillment Date: 01/01/2003

*Payment Schedule: S-Annual

First Payment Date: 01/01/2002

View All

First

1-3 of 3

Last

*Expt Dt	Expt Amt	Rcvd Dt	Rcvd Amt	Balance	Notified	
01/01/2002	250.00			750.00	<input type="checkbox"/>	+ -
07/01/2002	250.00			750.00	<input type="checkbox"/>	+ -
01/01/2003	250.00			750.00	<input type="checkbox"/>	+ -
<div>Adjust</div>		750.00	USD	0.00	750.00	

Pledge Schedule page

To create an initial payment schedule, select an increment of time in which payments are made such as *Annual*, *Monthly*, or *Bi-monthly* from the Pmt Schd prompt box on the Pledge Entry page. When you save the pledge, the system creates a schedule based on the first payment date and the pledge schedule you select.

You can also make extensive adjustments or create an irregular pledge payment schedule using the Pledge Schedule page. When you enter this page, the default payment schedule you created on the Pledge Entry page displays.

Expt Dt (expected date)

Enter the date on which you expect to receive the pledge payment. If you create an initial payment schedule, the expected payments dates begin with the first payment date you select, and an expected payment is created for each increment of time you specify in the payment schedule. For example, if you select a monthly payment schedule, expected payments are created for each month.

Important!

You can change the expected date for any pledge payments for which Notifications have not been sent or that have not been paid.

Expt Amt (expected amount)

Enter the amount you expect to receive as the pledge payment. If you create an initial payment schedule, the amounts in these fields populate by default to even amounts for each planned payment that totals the entire pledge amount. For example, if the donor made a pledge of USD 1,200.00 with monthly payments, the pledge is broken into 12 payments of USD 100.

Rcvd Dt (received date)

Displays the date on which a pledge payment is received.

Rcvd Amt (received amount)

Displays the monetary amount of a pledge payment.

Balance Displays the pledge balance after the pledge payment is received. If the pledge payment has not yet been received, the total outstanding pledge balance displays in this field.

Notified Select to indicate that a notification of the scheduled pledge payment has been sent.

Note. You cannot change expected pledge payments for which notifications have been sent.

Adjust Click to adjust the scheduled pledge payments on and below the line your cursor resides in, according to your changes.

Important! If you delete an entire planned pledge payment from the schedule, a message appears asking you to auto-assign the amount of the payment evenly to the remaining payments, or to manually allocate the amount of the payment among remaining payments. The schedule must balance expected amounts and pledge balance with the total pledge amount before the pledge can be saved.

Adjusting a Pledge Payment Schedule For a Constituent

Access the Pledge Schedule page.

Pledge Schedule

Whitney, Christopher
ID: AV0007
Institution: PSUNV

Constituent Type: Alumni
Yr: 1942

Pledge Nbr: 203
Details
Effective Date: 07/20/2001
Pldg Amt: 4,000.00 USD

Pmt Schd: S-Annual
Pldg Bal: 4,000.00

Duration: 3 years 1 day
Payments Rcvd: 0.00

*Expected Date	Expected Amount	Received Date	Received Amount	Notification Sent	
1 01/01/2002	571.43			<input type="checkbox"/>	+ -
2 07/01/2002	571.43			<input type="checkbox"/>	+ -
3 01/01/2003	571.43			<input type="checkbox"/>	+ -
4 07/01/2003	571.43			<input type="checkbox"/>	+ -

Total Expected/Received Amount: 4,000.00

Pledge Schedule page

Expected pledge payments can only be updated if they have not been received or if a notification has not been sent to the donor.

You can update a pledge schedule for any active pledge that has been posted.

Details Click to access the Pledge Detail page where you can view additional information about a pledge.

See Also

Chapter 22, “Entering Commitments,” Determining a Pledge Payment Schedule Within a Session, page 414

Viewing Pledges

Once you have created a session containing pledges, you can view information about the transactions in the session. If you are a supervisor and have security access, you can view information about pledges regardless of whose session they reside in.

This section discusses how to:

- View a pledge summary.
- View pledge details.
- View a supervisor pledge summary.
- View an open pledge register.
- View a pledge payment schedule.

Pages Used to View Pledges

Page Name	Object Name	Navigation	Usage
Pledge Summary	AV_PLDG_SMRY	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Inquire2, Pledge Summary, Pledge Summary • Manage Contributor Relations, Enter Commitments, Inquire2, Supervisor Pledge Summary, Supervisor Pledge Summ 	View information about the pledges you enter in a session. You can only view information about sessions that you currently control, unless you are a supervisor.
Pledge Detail	AV_PLDG_DTL_SP	<ul style="list-style-type: none"> • You can access the Pledge Detail page through multiple navigation paths. Below is the most frequently used path. • Click the Details button on the Pledge Summary page. 	View detailed information about a pledge transaction.
Supervisor Pledge Summary	AV_PLDG_SMRY	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Inquire2, Pledge Summary, Pledge Summary • Manage Contributor Relations, Enter Commitments, Inquire2, Supervisor Pledge Summary, Supervisor Pledge Summ 	View information about the pledges your staff enters in sessions.

Page Name	Object Name	Navigation	Usage
Open Pledge Register	AV_OPEN_PLDG, AV_OPEN_PLDG_E, AV_OPEN_PLDG_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Inquire, Open Pledge Register • Manage Contributor Relations, Enter Commitments, Inquire, Open Pledge Register-Org • Manage Contributor Relations, Enter Commitments, Workset, Open Pledge Register • Manage Contributor Relations, Analyze Giving History, Inquire, Open Pledge Register • Manage Contributor Relations, Analyze Giving History, Inquire, Open Pledge Register-Org • Manage Contributor Relations, Analyze Giving History, Workset, Open Pledge Register 	View a summary of a donor's pledges with open balances.
Pledge Schedule	AV_PLDG_SCHD_INQ, AV_PLDG_SCHD_INQ_E, AV_PLDG_SCHD_INQ_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Inquire, Pledge Schedule • Manage Contributor Relations, Enter Commitments, Inquire, Pledge Schedule-Org • Manage Contributor Relations, Enter Commitments, Workset, Pledge Schedule • Manage Contributor Relations, Analyze Giving History, Inquire, Pledge Schedule • Manage Contributor Relations, Analyze Giving History, Inquire, Pledge Schedule-Org • Manage Contributor Relations, Analyze Giving History, Workset, Pledge Schedule 	View information about the payment schedule associated with a particular pledge.

Viewing a Pledge Summary

Access the Pledge Summary page.

Pledge Summary

Business Unit: MEDBU
Status: Open
Date Opened: 10/22/2001

Session Number: 127
Last Modification Date: 10/22/2001
Balance Date:

Institution: PSUNV
User ID: PS
Post Date:

Total Count: 1
Total Amount: 15,000.00 USD

Select	Pldg Nbr	ID	Constituent	First Payment Date	Fulfillment Date	Pledge Amount	Details
1	<input type="checkbox"/>	281	8664	Carroll,Bruce	01/01/2002	12/31/2002	15,000.00 USD Details

Pledge Summary page

If the session you select is open, the pledge number, ID and constituent name, first payment date, fulfillment date, and gift amount display for each transaction in the session you selected. If the session is posted, you will not be able to select any transaction in the session to edit.

Details

Click to view detailed information about a particular pledge on the Pledge Detail page.

Select and Edit Pledge

If the pledge session you selected is open, you can select the check box next to a gift and click the Edit Pledge button to make changes to an existing pledge.

See Also

[Chapter 22, “Entering Commitments,” Viewing a Supervisor’s Pledge Summary, page 418](#)

[Chapter 22, “Entering Commitments,” Entering a Pledge Transaction, page 410](#)

Viewing Pledge Details

Click the Designation Detail button to view detailed information about the designations for this pledge. The Designation Detail page appears.

Click the Recognition Detail button to view detailed information about the recognition for this pledge. The Recognition Detail page appears.

Note. This page might include unposted pledge payments until the sessions are balanced, queued, and posted.

Viewing a Supervisor’s Pledge Summary

When you open this page, the gift number, effective date, first payment date, fulfillment date, and gift amount display for each transaction in the session you selected.

See Also

[Chapter 22, “Entering Commitments,” Entering a Pledge Transaction, page 410](#)

Viewing an Open Pledge Register

Access the Open Pledge Register page.

Open Pledge Register

Gallagher,Shawn
ID: AV0001

Constituent Type: Alumni
Yr: 2001
Institution: PSUNV

Business Unit:

Business Unit	Designation Name	Effective Date	Pledge Amount	Post Date	Payments Received	Balance	Pldg Nbr	Session Nbr	Details
1		04/23/2001	0.00		0.00	0.00			Details

Open Pledge Register page

Business Unit Enter the business unit for which to view a list of open pledges.

Viewing a Pledge Payment Schedule

Access the Pledge Schedule page.

Pledge Schedule

Gallagher,Shawn
ID: AV0001

Constituent Type: Alumni
Yr: 2001
Institution: PSUNV

Pledge Nbr: 159 [Details](#)
Pldg Amt: 1,000.00 USD

Pmt Schd: S-Annual
Effective Date: 03/09/2001
Pldg Bal: 1,000.00

Duration: 1 year 1 day
Payments Rcvd: 0.00

Expected Date	Expected Amount	Received Date	Received Amount	Notification Sent
1 03/09/2001	333.33			<input type="checkbox"/>
2 09/09/2001	333.33			<input type="checkbox"/>
3 03/09/2002	333.34			<input type="checkbox"/>

Pledge Schedule page

Details Click to view detailed information about the pledge on the Pledge Detail page.

Note. This page might include unposted pledge payments until the sessions are balanced, queued, and posted.

See Also

Chapter 22, “Entering Commitments,” Determining a Pledge Payment Schedule Within a Session, page 414

Adjusting Pledges

This section provides an overview of pledge adjustment and discusses how to enter a pledge adjustment transaction.

Understanding Pledge Adjustment

You can create pledge adjustment sessions, or groups of transactions that override existing posted transactions. Once a session is opened, you can add a group of transactions, then balance and post the session to your financial application.

When you create an adjustment transaction, a sequence number is created to indicate that there have been multiple actions on a particular gift number. For example, the initial entry is sequence 1 on AV_PLEDGE_DTL; the adjusted entry is sequence 2 on the AV_ADJ_PLDG_DTL table; and the corrected entry is sequence 3 on the AV_PLEDGE_DTL table.

Note. Adjusted transactions negate the original transaction and create a new transaction record, so enter adjustment amounts just as you would if entering the original transaction.

See [Chapter 22, “Entering Commitments,” Understanding the Gift and Pledge Process, page 371](#).

To adjust pledge transactions:

1. Initialize a session with the type of Adjust Pledge, using the Maintain Pledge Sessions page.
See [Chapter 22, “Entering Commitments,” Initializing and Balancing the Session, page 374](#).
2. Select session defaults using the Session Defaults page.
See [Chapter 22, “Entering Commitments,” Selecting Session Defaults, page 377](#).
3. Select the existing transactions to adjust using the Session Detail page.
See [Chapter 22, “Entering Commitments,” Viewing Session Details and Selecting Transactions to Edit or Delete, page 378](#).
4. Make the necessary changes to transactions using the Pledge Adjust page.
See [Chapter 22, “Entering Commitments,” Entering a Pledge Adjustment Transaction, page 421](#).
5. Balance, queue, and post the session.
See [Chapter 23, “Processing Commitments and Analyzing Giving History,” Queuing Sessions for Posting, page 426](#) and [Chapter 23, “Processing Commitments and Analyzing Giving History,” Processing and Posting Sessions, page 427](#).

Pages Used to Adjust Pledges

Page Name	Object Name	Navigation	Usage
Pledge Adjust	AV_ADJ_PLEDGE	Manage Contributor Relations, Enter Commitments, Use, Pledge Adjustment, Pledge Adjust	Adjust an existing pledge transaction.
Payment Schedule Adjust	AV_PLDG_SCHD	Manage Contributor Relations, Enter Commitments, Use, Pledge Adjustment	Adjust an existing pledge payment schedule as part of a transaction adjustment.

See Also

Chapter 22, “Entering Commitments,” Determining a Pledge Payment Schedule Within a Session, page 414

Entering a Pledge Adjustment Transaction

Access the Pledge Adjust page.

Pledge Adjust
Payment Schedule Adjust

Session Nbr: 85
Pldg Nbr: 159
Session Count: 1 of 1
Session Amount: 1000.00 of 500.00

Pledge Detail

ID: AV0001
Gallegher,Shawn
Alumni
2001

*Reason: Data entry error

Pledge Amount: 500.00 USD
Effective Date: 03/09/2001
Pmt Schd: S-Annual
First Pmt Dt: 03/09/2001
Fulfillment Date: 03/09/2002
☐ Feed Pledge

Designations
View All
First
1 of 1
Last

*Business Unit: MEDBU
Designation: MEDICALBLDG
Campaign: MED BLDG
Appeal Code: ANNUAL
Amount: 500.00

Recognition
View All
First
1 of 1
Last

*ID Type: Person
ID: AV0001
Constituent: Gallegher,Shawn
Type: Alumni
Recognition: H
Amount: 500.00
Anonymous: ☐

Tribute
View All
First
1 of 1
Last

Tribute Type: In Memory
ID: AV0004
Name: Holmgren,June
Amount: 1000.00 USD
Occasion: Birthday
Notify

Description:

[Balance Session](#)
[Session Defaults](#)
[Session Details](#)

Pledge Adjust page

Important! Adjusted transactions negate the original transaction and create a new transaction record, so enter adjustment amounts just as you would if entering the original transaction.

Note. The original transaction must be posted before you can adjust it.

Reason

Select a reason for the adjustment. Reason codes are defined by your institution and describe the reason why an adjustment is made.

Make any necessary changes to the fields on this page.

You can click the links at the bottom of this page to access related pages.

See Also

Chapter 22, “Entering Commitments,” Entering a Pledge Transaction, page 410

CHAPTER 23

Processing Commitments and Analyzing Giving History

This chapter provides an overview of commitment processing, lists common elements, and discusses how to:

- Queue sessions for posting.
- Process and post sessions.
- Process credit card transactions.
- Work with denied credit card transactions.
- Review credit card activity.
- View accounting lines.
- View suspended sessions.
- View information about and transfer sessions.
- Manage the acknowledgement process.
- Process acknowledgement letters.
- Generate acknowledgement letters.
- Work with manually generated acknowledgements.
- Manage joint communications.
- Handle matching gifts.
- Manage giving clubs.
- Generate CAE reports.
- Analyze giving history.
- Generate designation donor reports.
- Generate the Pledge Aging report.

Understanding Credit Card Processing

The PeopleSoft Contributor Relations credit card processing feature is a platform independent, component based, and secure tool that enables your organization to accept and process credit card payments for the receipt of gifts and membership dues. Administrators can use the online pages for background credit card processing, and self-service contributors can make credit card donations through pages in the Involvement collaborative application (if separately licensed) for realtime credit card donations.

Credit card processing involves the following functional areas:

- Entry of credit card information (through both core system and self-service pages).
- Credit card authorization.
- Credit card settlement.
- Credit card adjustment.
- Support for multiple credit card types.
- Realtime (self-service pages) and background (core system) processing.
- Credit card transaction review.

In terms of security, this feature provides confidentiality of payment information, ensures integrity for all transmitted data, performs cardholder authentication, and maintains an audit trail of authorization and transaction settlement.

Accessing the Credit Card Payment Pages

There are two primary users of the credit card payment pages – organization employees and self-service contributors. The following table lists each user’s possible modes of access.

User	Access Page
Organization Employee	Gift Entry – Tender Detail button
	Gift Adjustment – Tender Detail button
	Membership Entry – Tender Detail button
	Membership Adjustment – Tender Detail button
Self-Service Contributor	Make a Donation – Payment Information page (accessible through the Ways to Give link on the Involvement Home page.)


Administrators access the Gift Entry, Gift Adjustment, Membership Entry, and Membership Adjustment pages directly through the system's menu navigation to enter gifts and membership payments. The credit card entry page is accessible on each of these four pages via the Tender Detail button (if the tender type is set to a tender setup with a *Credit Card* special fields indicator).

Donors access the Make a Donation – Payment Information page through the Involvement collaborative application. To access this page, the donor must have an established transition ID or system ID and click either the Make your gift securely online link or the Invest in existing campaigns link on the Ways to Give page. Donors then enter gift information on the online giving pages that follow.

See Also

Chapter 25, “Managing Involvement and Self-Service Credit Card Transactions,” page 521

Common Elements Used in This Chapter

ID Type	Select whether the donor is a person or an organization.
ID or Org ID	Displays the donor's ID or enables you to enter the ID of the donor to work with. The donor's name or description may appear to the right.
Constituent	Displays the donor's name if it is a person, or description if it is an organization. The donor's highest priority constituent type may appear to the right.
	Click to access the CR Search page where you can search for a donor. See <u>Chapter 13, “Managing Constituent Data,” Using CR Search, page 161.</u>
Recognition	Select a type of credit the donor is receiving, such as <i>Hard</i> , <i>Soft</i> , <i>Vehicle</i> , and so on. Recognition types are defined by your institution, but always contain at least one hard credit type.
Amount	Enter an amount of the donation that gives this donor recognition. If you are entering gift transactions in a currency other than your business unit's base currency, the currency you selected is depicted on this page. However, for ease of reporting, recognition information is stored by the system in base currency.
Anonymous	Select if the donor receiving recognition does not want public recognition for the gift. There is no automated process of anonymity in the system. However, the Anonymous check box on the Giving Profile is selected if any gift a donor makes is anonymous.
Tribute Type	Select <i>In Memory</i> or <i>In Honor</i> to indicate whether the tribute is in memory of a deceased individual or in honor of an individual.
Name	Identify the person receiving tribute or memorial recognition. It is not necessary to have an ID in the system to enter tribute and memorial information. If an ID does not exist, enter the person's name.

Amount	The amount of the gift populates by default in this field, but you can change this amount.
Occasion	Describe the occasion that triggered the type of tribute. For example, the donor could be setting up a Memorial Scholarship in a deceased individual's name.
Maintain Sessions	Click to access the Maintain Sessions page where you can check expected and actual amount and balance the session.
Session Defaults	Click to view or update the defaults you set for this session using the Session Defaults page.
Session Details	Click to access the Session Details page where you can view information about all the transactions in the session. You can access specific transactions to update or delete them from this page.

Queuing Sessions for Posting

This section discusses how to queue balanced sessions for posting.

Page Used to Queue Sessions for Posting


Page Name	Object Name	Navigation	Usage
Queue Sessions	AV_POST_SESSION	<ul style="list-style-type: none"> Manage Contributor Relations, Enter Commitments, Use, Queue Sessions for Posting, Queue Sessions Manage Contributor Relations, Manage Memberships, Use, Queue Sessions for Posting, Queue Sessions 	Queue balanced sessions that are ready to be included in the GL Interface process for posting to your institution's financial system.

Queuing Balanced Sessions

Access the Queue Sessions page.

Queue Sessions

Institution: PSUNV PeopleSoft University

Business Unit:  Refresh

Self Service Session ☐

View All First 1-4 of 4 Last						
Queue	Business Unit	Session Number	Session Type	Session Status	User ID	Balance Date
<input type="checkbox"/>	MEDBU	108	Gift Adj	Balanced	LS	08/01/2001
<input type="checkbox"/>	PSUNV	61	Gift	Balanced	PS	02/01/2001
<input type="checkbox"/>	PSUNV	62	Gift	Balanced	PS	02/01/2001
<input type="checkbox"/>	PSUNV	63	Gift	Balanced	PS	02/01/2001

Select All Queue

Queue Sessions page

Note. Once a session is queued, it *cannot* be reopened for editing. Make sure that you are only queuing sessions that you know are ready for posting in the GL Interface process.

Business Unit	Enter the business unit for the sessions to queue for posting.
Self Service Session	Select the check box to note that the sessions contain gifts created as a result of self-service online giving.
Select All	Select the check box next to each session to queue for posting. To select all sessions listed, click the Select All button.
Queue	Select to lock the session and mark it for inclusion in the GL Interface process the next time it runs for the session's business unit.

Processing and Posting Sessions

This section provides overviews of session processing and posting, the GL interface process, and the process constituent accumulators process and also discusses how to:

- Run the GL interface process.
- Run the GL interface file extract process.
- Process constituent accumulators.
- View a journal generator template.

Understanding Session Processing and Posting

There are two processes you run to prepare balanced and queued sessions from your system to be posted as journal entries in PeopleSoft Financials.

1. The GL Interface process copies the transaction data from your Contributor Relations system into a table called AV_ACCTG_LN. In this table the transactions are associated with the appropriate item types in PeopleSoft Financials. When you set up item types for designations that will receive gift and pledge payments, they may only be associated with a credit. This process brings the debit and credit sides together to enable dual-line accounting entries in your financial system.

For example, a gift transaction for USD 100 has a debit of USD 100 to a tender account with a journal set of 0 and a credit of USD 100 to a designation account with a journal set of 1.

Tender	
Debit	Credit
USD 100	

Designation	
Debit	Credit
	USD 100

If the Feed Pledges check box is selected on the CR Installation page, a pledge transaction for USD 500 has a debit of USD 500 to accounts receivable with a journal set of 2 and a credit to a designation account with a journal set of 2. If the Feed Pledges check box is cleared, the pledge is not processed to the general ledger.

If the Feed Pledges check box is selected on the CR Installation page, a pledge payment of USD 500 for the previous pledge has a debit of USD 500 to a tender account with a journal set of 0 and a credit to accounts receivable with a journal set of 3. If the Feed Pledges check box is cleared, pledge payment transactions are handled as though they are gift transactions.

Tender	
Debit	Credit
USD 500 – Pledge Payment	

Accounts Receivable	
Debit	Credit
USD 500 – Pledge	USD 500 – Pledge Payment

Designation	
Debit	Credit
	USD 500 - Pledge

If a gift or membership transaction that has been posted is adjusted from USD 1,000 to USD 100, and the Refund check box is selected on the Gift Adjustment or Membership Adjustment page, the adjustment results in a refund to the donor. In this instance, the original transaction is negated by crediting the tender account USD 1,000 to reverse the original transaction, then debiting the tender account USD 900 for the refund and USD 100 for the new transaction amount. The designation account is adjusted by debiting USD 1,000 to reverse the transaction, then crediting USD 100 for the new transaction amount. Finally, the refund is recorded through a USD 900 credit to the clearing account. Refunds are not managed within the system except to create the entry to the clearing account.

Note. The default clearing account is set up on the Institution Installation page.

Tender	
Debit	Credit
	USD 1,000 (Gift)
USD 900 – Negate Gift	
USD 100 – Adjusted Gift	

Clearing Account	
Debit	Credit
	USD 900 - Refund

Designation	
Debit	Credit
USD 1,000 (Negate Gift)	USD 100 (Adjusted Gift)

2. Depending on the version of PeopleSoft Financials your institution uses:
 - If your institution uses PeopleSoft Financials 8.4, the information in the AV_ACCTG_LN table is sent to PeopleSoft Financials via Application Messaging. The Journal Generator process is run within PeopleSoft Financials to create journal entries.

See [Chapter 24, “Interfacing with PeopleSoft Financials 8.4,” page 505](#).
 - If your institution uses another version of PeopleSoft Financials or any other Financials application, the system creates a file that contains the AV_ACCTG_LN information, which is ready to be imported into your Financials system.

See Also

[Chapter 12, “Setting Up Commitment Management,” Setting Up Item Types, page 125](#)

Understanding the GL Interface Process

When you run the GL Interface process, the following events occur:

For Each Session

The following occurs:

1. The process evaluates the session type and branches to the appropriate sub-routine.
2. After the sub-routine (described below) runs, the session status is set to “P” for Posted when results are correct. Session status is set to “S” for Suspended if required information is missing.
3. If the process fails because the session is suspended or the process fails to run, any rows entered into AV_ACCTG_LN for the session are deleted.

For Gift Sessions

The following occurs:

1. Checks the ITEM_TYPE table to determine tender information.
2. If ITEM_TYPE is correct, the routine processes the GL Interface.
 - a. Checks the GL_INTERFACE table for ITEM_TYPE.
 - b. Creates dual-line accounting entry in AV_ACCTG_LN by combining tender information with designation information.
3. If ITEM_TYPE is None, the session suspends with the message “Item type not defined for tender” or “Item type not defined for designation.”

For Pledge Sessions

The following occurs:

1. Processes only pledges that are marked *feed pledge*.
2. If ITEM_TYPE is correct, the routine processes the GL Interface.
 - a. Checks the GL_INTERFACE table for ITEM_TYPE information.
 - b. Creates dual-line accounting entry in AV_ACCTG_LN by using designation information containing both credit and debit rows.
3. If ITEM_TYPE is None, the session suspends with the message “Item type not defined for designation.”

For Membership Sessions

The following occurs:

1. Checks the ITEM_TYPE table to determine tender
2. If ITEM_TYPE is correct, the routine processes the GL Interface.
 - a. Checks the GL_INTERFACE table for ITEM_TYPE information.
 - b. Creates dual-line accounting entry in AV_ACCTG_LN by combining tender information with designation information.
3. If ITEM_TYPE is None, the session suspends with the message “Item type not defined for tender” or “Item type not defined for designation.”
4. If the session includes gifts, gift AV_ACCTG_LN entries are created following the process for gift sessions.

For Adjustment Sessions

Processes information by:

1. Creating reversal rows in the AV_ACCTG_LN table for the most recent version of the transaction.
2. Creating new rows in the AV_ACCTG_LN table following the processes outlined above for the new version of the entry.
3. If a refund results from the adjustment, creates a row in the AV_ACCTG_LN table with the offsetting refund amount distributed to the clearing account defined on the Institution Defaults page.

Understanding the Constituent Accumulators Process

The Constituent Accumulators process builds accumulator tables that summarize data utilized by the Giving Profile and Commitment Summary pages. This process can be run as part of posting any session type via the AVPOST multi-process job, or run independently through its own run control definition.

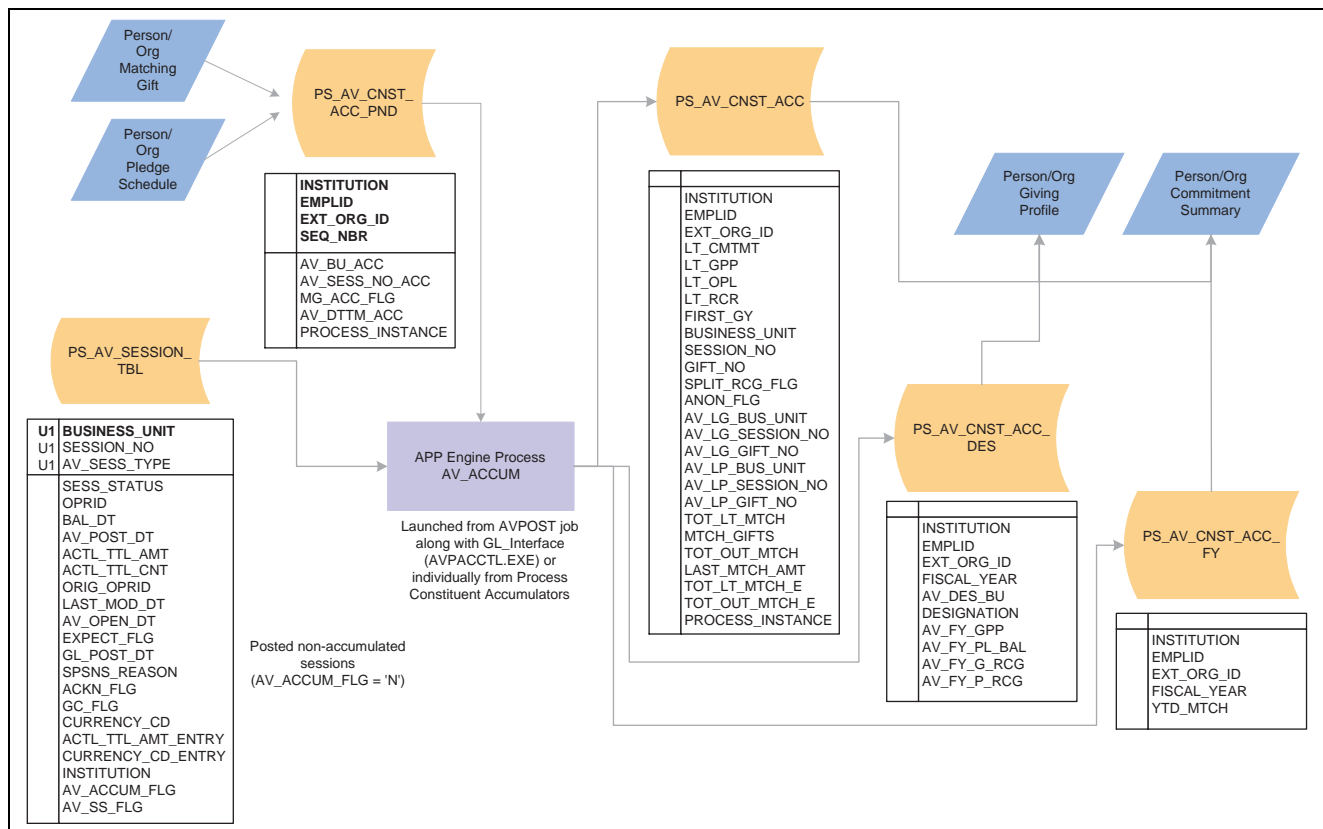
Your institution should decide if the information displayed on the Giving Profile and Commitment Summary pages needs to display the latest posted sessions. If so, the Constituent Accumulators process can be run along with the GL Interface in the AVPOST multi-process job. If not, the Constituent Accumulators process can be run independently in an off-peak processing window. Regardless of the run method, the process always attempts to complete all posted and non-accumulated sessions in the system.

The process works as follows:

1. Constituent records are loaded from the Constituent Pending Accumulation table (AV_CNST_ACC_PND) and locked.
2. Temporary accumulator records are calculated and updated from temporary tables.
3. Locks on constituent records are released.
4. Related constituent records from posted, non-accumulated sessions are loaded and locked.
5. Temporary accumulator records are calculated and updated from temporary tables.
6. Locks on constituent records are released.
7. The accumulator flag on the session table (AV_SESSION_TBL.AV_ACCUM_FLG) is set to 'Y'.

Note. If a session does not accumulate because a constituent accumulator record is locked by another accumulator process, the system skips the session and processes it the next time the accumulator process runs. The locked constituent and the locking process instance is indicated in the Process Monitor Message Log.

Note. If locking problems persist and the constituent accumulator record is locked by a process that is no longer running, check the constituent accumulator table (PS_AV_CNST_ACC) for records where the PROCESS_INSTANCE field is not equal to zero. Add all constituent records with a non-zero, non-processing PROCESS_INSTANCE to the pending accumulation table (PS_CNST_ACC_PND) and reset the locking records PROCESS_INSTANCE to zero. Re-run the process. Once the process runs, the pending accumulation table should be empty, and all posted sessions should be processed.



Constituent Accumulators process flow

Pages Used to Process and Post Sessions

Page Name	Object Name	Navigation	Usage
GL Interface (general ledger interface)	AV_RUN_CNTL_GL	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Process, G/L Interface, GL Interface • Manage Contributor Relations, Manage Memberships, Process, G/L Interface, GL Interface 	Process sessions and prepare them for journal entry in PeopleSoft Financials.
GL Interface File Extract (general ledger interface file extract)	AV_RUNCTL_ACTLN	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Process, G/L Interface File Extract, GL Interface File Extract • Manage Contributor Relations, Manage Memberships, Process, G/L Interface File Extract, GL Interface File Extract 	Manually generate a flat file containing data from AV_ACCTG_LN to be exported to PeopleSoft Financials.
Constituent Accumulators	AV_RUNCTL_ACCUM	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Process, Constituent Accumulators, Constituent Accumulators • Manage Contributor Relations, Manage Memberships, Process, Constituent Accumulators, Constituent Accumulators 	Run the process that builds accumulator tables for summarizing data on the Giving Profile and Commitment Summary pages.

Running the GL Interface Process

Access the GL Interface page.

GL Interface

Run Control ID: mbr
[Report Manager](#)
[Process Monitor](#)

*Business Unit: MEDBU Medical Business Unit

Institution: PeopleSoft University

*Journal Template: AVIGL Advancement

*Commit Level: 100

Financials Release: 8.4

GL Interface page

Sessions must be queued for posting before they are processed. This process combines the tender account with the designation to create a dual line accounting entry.

Note. You must select a default Clearing Account on the Institution Installation page for this process to run.

Journal Template	Enter a journal template. These values are defined by your institution and determine how data is mapped to PeopleSoft Financials. See Chapter 12, “Setting Up Commitment Management,” Preparing for Session Posting, page 125.
Commit Level	Determine how many sessions will be processed before the system commits the transactions to your financial system.
Financials Release	Displays the version of Financials software selected on the CR Installation page.

If the process is set up, when you click the Run button, Process Scheduler runs the GL Interface process at user-defined intervals.

If your institution uses Financials software other than PeopleSoft Financials 8.4, run the AVPOST job, which completes the AV/GL Post process, creates an extract file for export to PeopleSoft Financials, and accumulates constituent totals for the Giving Profile and Commitment Summary pages.

If your institution uses PeopleSoft Financials 8.4, run the AVPOST2 job, which runs similarly to the AVPOST job but replaces the SQR report output with the EOP_PUBLISHA process.

The EOP_PUBLISHA process does the following:

1. Selects accounting lines based on three criteria: process or job instance, process name, and process status.
2. Collects accounting line entries generated by the GL Interface AVPACCTL COBOL process and publishes them to the PeopleSoft Financials 8.4 database.

PeopleSoft Financials subscribes to the published messages in the PeopleSoft Contributor Relations database, takes the accounting lines into their AV_ACCTG_LN table, and runs those lines through Journal Generator to create journals. PeopleSoft Financials then publishes the updated accounting lines, PeopleSoft Contributor Relations subscribes to these lines, and the data published by PeopleSoft Financials updates the PeopleSoft Contributor Relations AV_ACCTG_LN table.

See Also

Chapter 24, “Interfacing with PeopleSoft Financials 8.4,” Running the AVPOST2 Job, page 513

Running the GL Interface File Extract Process

Access the GL Interface File Extract page.

GL Interface File Extract page

If your institution uses a version of PeopleSoft Financials earlier than 8.4, or uses an external Financials system, you need to run this process if the AV_POST job failed or if you chose to run only the AVPACCTL process rather than the complete GL Interface job.

Process Instance Select the process instance of the GL Interface process for which to generate an extract file.

If the process is set up, when you click the Run button, Process Scheduler runs the GL Interface File Extract process at user-defined intervals.

Processing Constituent Accumulators

Access the Constituent Accumulators page.

Constituent Accumulators page

If you process sessions using the AVPOST multi-process job, the system runs the processes automatically as part of that routine. If you choose to run the GL Interface independently, run this process to provide current accumulated data on the Giving Profiles and Commitment Summary pages.

Business Unit Select the business unit associated with the sessions for which to run the Accumulate Constituent Totals process.

If the process is set up, when you click the Run button, Process Scheduler runs the Accumulate Constituent Totals process at user-defined intervals.

Viewing a Journal Generator Template

Use the Journal Generator Template component to review how journal templates for PeopleSoft Contributor Relations are set up in PeopleSoft Financials.

See Also

PeopleSoft 8.4 Financials: General Ledger PeopleBook

Processing Credit Card Transactions

This section provides an overview of credit card transaction processing and discusses how to:

- Select gift and membership transactions for processing.
- Authorize gift and membership transactions.
- Settle gift and membership transactions.
- Authorize and settle transactions as a single process.

Understanding Credit Card Transaction Processing

Once you have posted a gift or membership with a credit card tender type to the general ledger, you can then process it through the third-party payment processor, CyberSource. PeopleSoft Contributor Relations supports the following transaction processes through CyberSource:

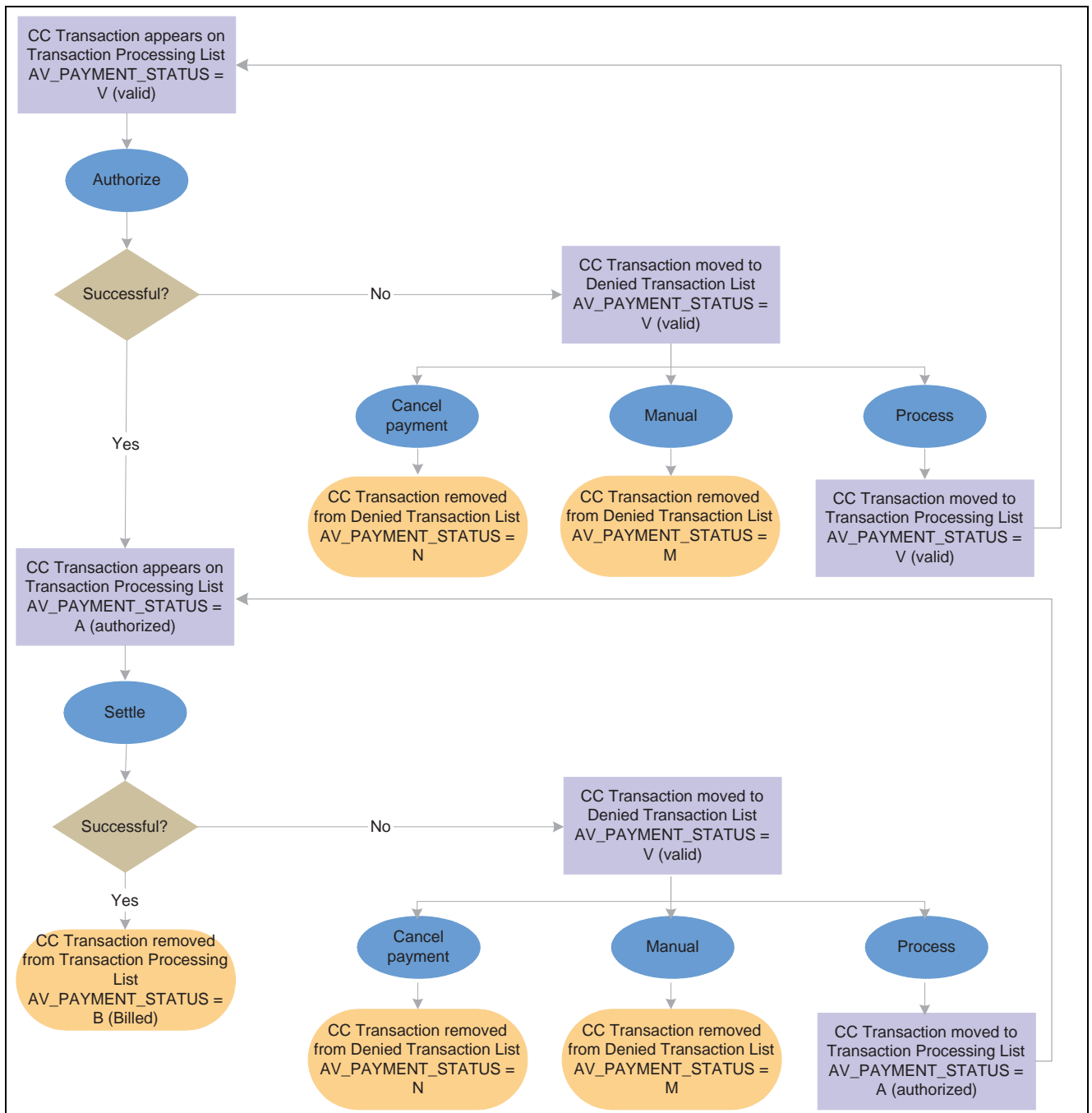
- **Authorization** – authenticates the credit card number and places a temporary hold on the specified amount against the cardholder’s credit card. Also generates an authorization number and reduces the cardholder’s available credit by the authorized amount. If the credit card information is not correct, or the cardholder does not have available credit, the system generates a message declining the transaction. Note that CyberSource does not bill the credit card at this time; it only verifies that the card is valid for the charge.
- **Settlement** – confirms the temporary hold placed on credit card funds after a transaction has been authorized and bills the credit card.
- **AuthSettle** – combines transaction authorization and settlement together in a single process.
- **Credit** – issues a refund to a customer’s credit card account after an adjusted gift or membership.

The table below lists all possible transaction statuses that are assigned to gift and membership transactions as they move through the credit card payment process.

Status Value	Definition
<i>V</i> (valid)	Upon entry of successfully validated credit card information on the credit card entry page, the AV_EP_GIFT_DTL or AV_EP_MBR_DTL tables initialize the AV_PAYMENT_STATUS field to <i>V</i> for this transaction. The transaction is ready for initial processing. The prerequisite to authorize gift or membership transactions is to have a value in the AV_PAYMENT_STATUS field of <i>V</i> .
<i>A</i> (authorized)	After successful authorization from the third-party payment processor, the system sets the value of the AV_PAYMENT_STATUS field for the gift or membership transaction (AV_EP_GIFT_DTL or AV_EP_MBR_DTL table) to <i>A</i> . The prerequisite to settle a gift or membership transaction is to have an AV_PAYMENT_STATUS value of <i>A</i> .
<i>B</i> (settled)	After successful billing from the third-party payment processor, the system sets the AV_PAYMENT_STATUS field for the gift or membership transaction to <i>B</i> . Once a transaction is settled, it is considered complete and no longer shows up on the EP Transaction Processing – Filter Options page.
<i>P</i> (pending credit)	After a gift or membership transaction has been adjusted, once it has been settled, if the credit card information has been modified then the original amount charged to the credit card needs to be refunded. As part of the adjustment process, the system updates the AV_PAYMENT_STATUS field to <i>P</i> for this transaction. The transaction is ready to be credited.

Status Value	Definition
<i>C</i> (refunded)	A transaction has an AV_PAYMENT_STATUS value of <i>C</i> as a successful result of selecting the transactions after filtering on a Transaction Requested value of <i>Credit</i> on the EP Processing Transaction – Filter Options page and processing these transactions through a third-party credit card processor.
<i>D</i> (denied)	After a transaction is sent to the third-party payment processor, if the system generates a message declining the transaction, the system updates the AV_PAYMENT_STATUS field to <i>D</i> for this transaction. Denied transactions are then ready to be viewed and selected from the EP Denied Transactions page.
<i>N</i> (cancelled)	A transaction has an AV_PAYMENT_STATUS value of <i>N</i> as a result of the adjustment process or as a result of selecting the transaction and running the Cancel Pmt process through the EP Denied Transactions – Transaction List page.
<i>M</i> (manual)	A transaction has an AV_PAYMENT_STATUS value of <i>M</i> as a result of selecting the transaction and running the Manual process through the EP Denied Transactions – Transaction List page. If a transaction is flagged as Manual, all subsequent adjustments to the transaction also need to be Manual.

The following graphic illustrates the steps involved in processing gift and membership credit card transactions.



Summary of electronic payment transaction processing

Pages Used to Process Credit Card Transactions

Page Name	Object Name	Navigation	Usage
EP Transaction Processing – Filter Options	AV_EP_FLTR	<ul style="list-style-type: none"> Manage Contributor Relations, Enter Commitments, Process, EP Transaction Processing (to select gifts) Manage Contributor Relations, Manage Memberships, Process, EP Transaction Processing (to select memberships) 	Enter your selection criteria for the gifts or member transactions to process.
EP Transaction Processing – Transaction List	AV_EP_G_PROC, AV_EP_M_PROC	Click the Search button on the EP Transaction Processing – Filter Options page.	Select and authorize gift or membership transactions that meet the criteria you entered on the EP Transaction Processing – Filter Options page.

Selecting Gift and Membership Transactions for Processing

Access the EP Transaction Processing – Filter Options page.

EP Transaction Processing
Filter Options

***Institution:** PeopleSoft University

Business Unit: Medical Business Unit

Tender Type: Credit Card

Transaction Requested:

Item

Self Service Session

- ☒ All Sessions
- ☐ Only Self Service
- ☐ Non Self Service

Post Date

From

To

Session Nbr:

Gift Nbr:

EP Transaction Processing – Filter Options page

Institution Enter an institution code.

Business Unit Enter a business unit for the gift or membership transactions to process. If you leave the business unit blank, you retrieve all gifts or membership transactions for the institution.

Note. Session number and gift number fields are tied to the business unit; you must specify a business unit here to filter on these two fields later on the page.

Tender Type

Enter the electronic processing tender type for the gift or membership transactions to process.

Note. The example above uses *CC* to designate this electronic payment tender type. However, you can define it as anything using the Tender Types page.

Transaction Requested

There are four credit card transaction processes currently supported by CyberSource: *Authorize*, *Settle*, *AuthSettle*, and *Credit*. Select the appropriate transaction for the processing step to complete.

Self Service Session

Select the type of session to process. Select *All Sessions* to select gifts and memberships made through both PeopleSoft Contributor Relations and Involvement self-service pages. Select *Only Self Service* to select gifts made through the self-service Make a Donation pages only. Select *Non Self Service* to select gifts made through PeopleSoft Contributor Relations non self-service pages only.

Post Date

Enter both From and To dates to select gifts or memberships posted within the range.

Session Nbr (session number)

Enter a session number to select gifts made in this specific session only. To display a session, you must enter a business unit.

Gift Nbr (gift number)

If you are processing gift transactions, this field is available for entry. Enter a gift number to select gifts made with this gift number only. To display a specific gift, you must enter a business unit.

Mbr Pmt Nbr (membership payment number)

If you are processing membership transactions, this field is available for entry. Enter a membership payment number to select membership transactions made with this payment number only. To display a membership, you must enter a business unit.

Search

Click to filter the electronic payment transactions according to the specified criteria and display the results on the EP Transaction Processing – Transaction List page.

See Also

Chapter 23, “Processing Commitments and Analyzing Giving History,” Authorizing Gift and Membership Transactions, page 441

Chapter 23, “Processing Commitments and Analyzing Giving History,” Settling Gift and Membership Transactions, page 443

Chapter 22, “Entering Commitments,” Adjusting Gift and Membership Credit Card Payments, page 402

Authorizing Gift and Membership Transactions

Access the EP Transaction Processing – Transaction List page.

EP Transaction Processing
Transaction List

Institution: PSUNV PeopleSoft University
Transaction Requested: Authorize
Self Service Session: All Sessions

[Process Monitor](#) [Set Filter Options](#)

[View All](#) First 1-7 of 10 Last

Select	Payment Status	Business Unit	Tender	Session Nbr	Gift Nbr	Post Dt	Auth Dt	Reference Nbr	ID	Gift Amt
<input type="checkbox"/>	Valid	MEDBU	CC	265	510	11/15/2001			AD1000	2000.00
<input type="checkbox"/>	Valid	MEDBU	CC	265	511	11/15/2001			AD1000	2000.00
<input type="checkbox"/>	Valid	MEDBU	CC	265	512	11/15/2001			AD1000	2000.00
<input type="checkbox"/>	Valid	MEDBU	CC	265	513	11/15/2001			AD1000	2000.00
<input type="checkbox"/>	Valid	MEDBU	CC	373	669	11/20/2001			AV3000	100.00
<input type="checkbox"/>	Valid	MEDBU	CC	388	680	11/21/2001			AV3001	90.00
<input type="checkbox"/>	Valid	MEDBU	CC	388	681	11/21/2001			AV3002	100.00

EP Transaction Processing – Transaction List page

Note. On the EP Transaction Processing – Filter Options page, set Transaction Requested to *Authorize*.

The following fields on this page are defined on the EP Transaction Processing – Filter Options page: Business Unit, Tender, Session Nbr, Gift Nbr, Mbr Pmt, Nbr (if authorizing membership transactions), and Post Dt.

Select and Select All	Select the check box for each row to process, or click the Select All button to select all rows on the page.
Payment Status	Displays the current transaction status. If you click a link under this heading, a page appears that displays all existing transaction processing information. See Chapter 23, “Processing Commitments and Analyzing Giving History,” Understanding Credit Card Transaction Processing, page 436.
Auth Dt (authorization date)	Once the transaction is authorized, the system populates this field.
Reference Nbr (reference number)	Once the transaction is sent, the system populates this field with a system-generated reference number used to communicate with the third-party credit card processor.
Gift Amt (gift amount)	If the transaction is a gift, displays the amount of the gift credit card transaction.
Mbr Dues (membership dues)	If the transaction is a membership, displays the amount of the membership credit card transaction.
Process	Click to run the authorization process. The system gathers the transactions you select and sends them to the third-party credit card processor. Important! After you click the Process button, give the process at least 30 seconds to run.

Set Filter Options Click to return to the EP Transaction Processing – Filter Options page.

If the search criteria you enter on the EP Transaction Processing – Filter Options page does not meet any existing transaction records, you receive the following informational message.

EP Transaction Processing	
Transaction List	
Institution:	PSUNV PeopleSoft University
Transaction Requested:	Authorize
Self Service Session:	All Sessions
Process Monitor Set Filter Options	
No records found. Return to the filter options to change the page criteria.	

EP Transaction Processing – Transaction List message (AV_EP_G_PROC)

Important! On the EP Transaction Processing – Transaction List page, if you click the Select All button to select transactions for processing, you receive the informational message above. This does not mean there was a processing error; the system uses this message to notify you that processing of the entire Transaction List is complete, and it has found no more records to process.

Once the system authorizes a transaction, the value of the AV_PAYMENT_STATUS field for gift or membership transactions (AV_EP_GIFT_DTL or AV_EP_MBR_DTL) becomes *A*. If any transactions do not successfully authorize, you must complete them using the denied transactions process or using a gift adjustment session.

See Also

Chapter 23, “Processing Commitments and Analyzing Giving History,” Working With Denied Credit Card Transactions, page 444

Chapter 22, “Entering Commitments,” Adjusting Gift and Membership Credit Card Payments, page 402

Chapter 23, “Processing Commitments and Analyzing Giving History,” Selecting Gift and Membership Transactions for Processing, page 440

Settling Gift and Membership Transactions

Once the system authorizes a group of transactions, you can filter for transactions using the EP Transaction Processing – Filter Options page and then select and settle the transactions using the EP Transaction Processing – Transaction List page. When you return to these pages, you must filter and process the transactions with a Transaction Requested field value of *Settle*.

Note. All gifts made through PeopleSoft Involvement self-service pages enter the system at this stage, authorized and ready to be settled.

Once the system settles a transaction, the value of the AV_PAYMENT_STATUS field for gift or membership transactions (AV_EP_GIFT_DTL or AV_EP_MBR_DTL) becomes *B*.

See Also

[Chapter 23, “Processing Commitments and Analyzing Giving History,” Selecting Gift and Membership Transactions for Processing, page 440](#)

[Chapter 23, “Processing Commitments and Analyzing Giving History,” Authorizing Gift and Membership Transactions, page 441](#)

Authorizing and Settling Transactions as a Single Process

Instead of authorizing and settling gift and membership transactions in separate steps, you can run both processes in one step. For some organizations, this is preferable because it allows you to streamline your processes. For others, it is more valuable to monitor each process.

Note. Your organization may have financial considerations, because a third-party credit card processor charges a per transaction fee; authorizing and settling are considered separate transactions. If you choose to authorize and settle in a single succession, use a single transaction to auth/settle.

If you decide to authorize and settle in a single process, you can use the same EP Transaction Processing – Filter Options and EP Transaction Processing – Transaction List pages as you would when authorizing and settling separately. However, when you use these pages, you must filter and process the transactions with a Transaction Requested field value of *AuthSettle*.

Once the system successfully authorizes and settles a transaction in a single succession, its status becomes *B*.

See Also

[Chapter 23, “Processing Commitments and Analyzing Giving History,” Selecting Gift and Membership Transactions for Processing, page 440](#)

[Chapter 23, “Processing Commitments and Analyzing Giving History,” Authorizing Gift and Membership Transactions, page 441](#)

[Chapter 23, “Processing Commitments and Analyzing Giving History,” Settling Gift and Membership Transactions, page 443](#)

Working With Denied Credit Card Transactions

This section provides an overview of denied credit card transactions and discusses how to:

- Select denied gift and membership transactions for processing.
- Authorize and settle denied gift and membership transactions.

Understanding Denied Credit Card Transactions

When you attempt to authorize or settle credit card gift and membership transactions, you occasionally receive denial messages from your third-party credit card processor. Denials occur for many reasons, including invalid card number, account over limit, internet communication problems with the third-party credit card processor, and so on. Whenever transactions are denied, the value of the AV_PAYMENT_STATUS field becomes *D*.

To resolve denied transactions. You can use the EP Denied Transactions – Filter Options and EP Denied Transactions – Transaction List pages to perform the following functions:

- Retry the authorization, process the settlement, authorize and settle, or process a credit.
- Handle the transaction manually.
- Cancel the payment of the transaction.

Pages Used to Work With Denied Credit Card Transactions

Page Name	Object Name	Navigation	Usage
EP Denied Transactions – Filter Options	AV_EP_FLTR	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Process, EP Denied Transactions • Manage Contributor Relations, Manage Memberships, Process, EP Denied Transactions 	Enter your selection criteria for the gifts or member transactions to process.
EP Denied Transactions – Transaction List	AV_EP_G_PROC, AV_EP_M_PROC	Click the Search button on the EP Transaction Processing – Filter Options page.	Select and authorize or settle denied gift or membership transactions that meet the criteria you entered on the EP Denied Transactions – Filter Options page.

Selecting Denied Gift and Membership Transactions for Processing

Access the EP Denied Transactions – Filter Options page.

EP Denied Transactions Filter Options

***Institution:** Great Lakes University
Business Unit: GLAKE Law School
Tender Type: Credit Card
Transaction Requested: Search

Item

Self Service Session

☒ All Sessions
☐ Only Self Service
☐ Non Self Service

Post Date

From
To

Session Nbr:
Gift Nbr:

EP Denied Transactions – Filter Options page

Use this page in the same way that you select gifts and memberships for authorization and settlement; the difference is that this page only searches those transactions that your third-party credit card processor denied.

The fields on this page are the same as those on the EP Transaction Processing – Filter Options page. For denied gift or membership transactions, however, the Transaction Requested value you select is the stage at which the gift or membership transaction is denied: during authorization, settlement, combined authorization/settlement, or credit.

See Also

[Chapter 23, “Processing Commitments and Analyzing Giving History,” Selecting Gift and Membership Transactions for Processing, page 440](#)

Authorizing and Settling Denied Gift and Membership Transactions

Access the EP Denied Transactions – Transaction List page.

EP Denied Transactions
Transaction List

Institution: GLAKE Great Lakes University
Transaction Requested: Authorize
Self Service Session: All Sessions

[Process Monitor](#) [Set Filter Options](#)

[View All](#) First 1 of 1 Last

Select	Payment Status	Business Unit	Tender	Session Nbr	Gift Nbr	Post Dt	Reference Nbr	ID	Gift Amt	Result
<input type="checkbox"/>	Declined	GLAKE	CC	161	320	11/08/2001		AV3000	45.00	DCARDREFUSED

[Select All](#) [Process](#) [Manual](#) [Cancel Pmt](#)

EP Denied Transactions – Transaction List page

Note. To authorize, on the EP Denied Transactions – Filter Options page set Transaction Requested to *Authorize*. To settle, set Transaction Requested to *Settle*.

The following fields on this page are defined on the EP Transaction Processing – Transaction List page: Payment Status, Business Unit, Tender, Session Nbr, Gift Nbr, Mbr Pmt Nbr, (if authorizing or settling membership transactions), Post Dt, Reference Nbr, ID, and Gift Amt.

This page also lists the Result message for the transaction.

After you select the appropriate rows, click the Process button to retry the transaction. The process runs the same as it does for the initial attempt to authorize, settle, authorize and settle, or credit a transaction.

Click the Manual button to handle a denied transaction manually. For example, you may want to call the contributor, adjust the gift, or contact your third-party credit card processor directly to resolve the transaction. Denied transactions dealt with manually receive a status of *M*.

Note. Once you choose to handle a transaction manually, you must perform all subsequent actions manually, such as authorization, validation, or settlement.

Click the Cancel Pmt button to cancel the transaction. The transaction then appears in the transaction log file with a status of *N*. Once you cancel a transaction, you can no longer filter on it using the EP Denied Transactions – Filter Options page.

Important! After you click the Process, Manual, or Cancel Pmt buttons, give each process at least 30 seconds to run.

See Also

[Chapter 23, “Processing Commitments and Analyzing Giving History,” Authorizing Gift and Membership Transactions, page 441](#)

[Chapter 23, “Processing Commitments and Analyzing Giving History,” Settling Gift and Membership Transactions, page 443](#)

Reviewing Credit Card Activity

You may need to track credit card activity by day, session, business unit, and so on. You may also need to track transactions that are waiting to be sent for third-party processing. PeopleSoft Contributor Relations retains a historical record of all credit card activity that you can filter and review. For example, you can view which transactions were sent, which passed, and which failed, and other transaction details.

This section discusses how to:

- Select gift and membership transactions for review.
- Review gift and membership transactions.

Pages Used to Review Credit Card Activity

Page Name	Object Name	Navigation	Usage
EP Transaction Log Inquiry – Filter Options	AV_EP_LOG_FLTR	Manage Contributor Relations, Enter Commitments, Inquire2, EP Transaction Log Inquiry	Enter your selection criteria for the gifts or membership transactions to review.
EP Transaction Log Inquiry – Transaction List	AV_EP_TRANS_LOG	Click the Search button on the EP Transaction Log Inquiry – Filter Options page.	View the transactions that meet the criteria you selected on the EP Transaction Log Inquiry – Filter Options page.

Selecting Gift and Membership Transactions for Review

Access the EP Transaction Log Inquiry – Filter Options page.

EP Transaction Log Inquiry

Filter Options

*Institution: PeopleSoft University

Business Unit:

Tender Type:

Payment Status:

Item

Transaction Date

From

To

Reference Nbr:

Session Nbr:

Receipt Nbr:

Gift Nbr:

EP Transaction Log Inquiry – Filter Options page

The fields on this page are similar to those on the EP Transaction Processing – Filter Options page used to initially authorize, settle, auth/settle, or credit transactions.

Use this page to filter any gift and membership transactions that have any status and are at any point in the credit card process. You can retrieve transaction details for any time period by entering a Transaction Date range. To review all transactions associated with a gift or membership, enter its 15-character Reference Nbr (reference number). To retrieve log information associated with a self-service gift, enter its 12-character Receipt Nbr (receipt number).

See Also

Chapter 23, “Processing Commitments and Analyzing Giving History,” Selecting Gift and Membership Transactions for Processing, page 440

Reviewing Gift and Membership Transactions

Access the EP Transaction Log Inquiry – Transaction List.

EP Transaction Log Inquiry

Transaction List

Institution: PSUNV PeopleSoft University [Set Filter Options](#)

1 of 2

Reference Number	Sequence number	Payment Status	Credit Card Message 1
0000000000000002	1	Authorized	ICS:1 SOK
0000000000000004	1	Authorized	ICS:1 SOK

EP Transaction Log Inquiry – Transaction List page: List tab

Reference Nbr (reference number)	The system populates this field by default with a system-generated reference number used to communicate with the third-party credit card processor.
SeqNum (sequence number)	Indicates how many actions the system has taken on a particular reference number.
Payment Status	Indicates the results of each system action.
Credit Card Message 1	Displays the resulting response message from your third-party credit card processor.

EP Transaction Log Inquiry

Transaction List

Institution: PSUNV PeopleSoft University

[Set Filter Options](#)

View All First 1-2 of 2 Last

ListDetail

Business Unit	Tender	Session Number	Gift Nbr	Transaction Date	Authorization Date	ID	Gift Amt	Receipt Nbr	Authorization Reply
MEDBU	CC			09/10/2002	09/10/2002	8664	115.00	000000000002	Approve
MEDBU	CC			09/10/2002	09/10/2002	8664	55.00	000000000003	Approve

EP Transaction Log Inquiry– Transaction List page: Detail tab

The Detail tab provides more clarity about each gift or membership credit card payment. For each transaction on the List tab, you view the corresponding Business Unit, Tender, Session Number and Gift Nbr (numbers), Transaction Date, Authorization Date if applicable, the person or organization ID, the Gift or Dues Amt (amount), the Receipt Nbr (number), and the Authorization Reply the system received from your third-party credit card processor.



Click to combine information from both the List and Detail tabs into a single page view. This combined view enables you, for example, to view all transactions involved with a reference number, each transaction's result, and the gift's subsequent gift number.



Click to return to the tabbed view of the EP Transaction Log Inquiry – Transaction List page.

Viewing Accounting Lines

This section discusses how to view generated accounting lines. The system generates accounting lines through the GL Interface process.

Note. This section contains updated functionality related to Update ID #109140 that was posted to Customer Connection in September 2002.

Page Used to View Accounting Lines

Page Name	Object Name	Navigation	Usage
Accounting Line	AV_ACCTG_LN_INQ	Manage Contributor Relations, Enter Commitments, Inquire2, Accounting Line,	View accounting line information, generated by the GL Interface process, that resides on the AV_ACCTG_LN table.

Viewing Generated Accounting Lines

Access the Accounting Line page.

Accounting Line

Business Unit: MEDBU Medical Business Unit

Search Criteria

☐ Person

☐ External Organization

☒ Session Number 107

☐ Run Date and Sequence Number

Session Nbr	Name	Ledger	General Ledger Unit	Account	Department	Project/Grant	Accounting Date
1 107	Joes Auto Shop	ACTUALS	PSUNV	400005	LAS		08/01/2001
2 107	Joes Auto Shop	ACTUALS	PSUNV	110000	LAS	LIBRARY	08/01/2001
3 107	Joes Auto Shop	ACTUALS	PSUNV	110000	LAS	LIBRARY	08/01/2001
4 107	Kohnes Coffee Shop	ACTUALS	PSUNV	400000	LAS		08/01/2001
5 107	Kohnes Coffee Shop	ACTUALS	PSUNV	110000	LAS	LIBRARY	08/01/2001
6 107	Kohnes Coffee Shop	ACTUALS	PSUNV	110000	LAS	LIBRARY	08/01/2001

Accounting Line page: General Information 1 tab

Note. Multiple views of this page are available by clicking the tabs in the scroll area.

Search Criteria

Here are fields that are common to all views.

Person

Select this option to view the accounting lines for a single person. Enter the ID in the field to the right. Only those transactions on the accounting line table that involve this person and the selected business unit are available for review.

External Organization

Select this option to view the accounting lines for a single external organization. Enter the external organization in the field to the right. Only those external organizations with transactions on the accounting line table for this business unit are available for review.

Session Number

Select this option to view the accounting line for an entire session. Enter the session number in the field to the right. Only those session numbers on the accounting line table for this business unit are available for review.

Run Date and Sequence Number

Select this option to view the accounting line for a specific GL Interface process instance. Enter a date and the sequence number in the fields to the right. You must enter the date before the sequence number. Only those sequence numbers on the date you select on the accounting line table for this business unit are available for review.

GL Chartfield 1 and 2

These tabs display the information sent to PeopleSoft Financials 8.4. The GL Interface process currently populates the following fields:

- Fund
- Budget Reference
- Chartfield 1
- Chartfield 2
- Chartfield 3

See Also

[Chapter 24, “Interfacing with PeopleSoft Financials 8.4,” Viewing Accounting Lines, page 517](#)

[Chapter 24, “Interfacing with PeopleSoft Financials 8.4,” page 505](#)

Viewing Suspended Sessions

This section discusses how to view information about suspended sessions.

Page Used to View Suspended Sessions

Page Name	Object Name	Navigation	Usage
Suspended Sessions	AV_SPSN_SESSION	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Use, Suspended Sessions, Suspended Sessions • Manage Contributor Relations, Manage Memberships, Use, Suspended Sessions, Suspended Sessions 	View information about sessions that were suspended during the posting process.

Viewing Suspended Session Information

Access the Suspended Sessions page.

Suspended Sessions

Institution: PSUNV PeopleSoft University

Business Unit:

View All First 1 of 1 Last

Business Unit	Session Number	Session Type	Session Status	User ID	General Ledger Posting Date	Suspense Reason
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Suspended Sessions page

When you post gift and pledge sessions, the system displays any sessions that were suspended for any reason on this page. You can re-open the session and make the necessary adjustments to enable proper posting.

Suspense Reason Displays the reason the system suspended the session. The following table lists the possible suspense reasons and their corresponding messages.

Reason	Message
If a CR Clearing Account Item Type is not set up correctly	Clearing Acct ITEM_TYPE Missing for <i>Institution</i>
If the Gift Total does not equal zero after subtracting each of the designation/recognition totals for the gift	Gift Amt of Gift <i>Number</i> not distributed
If the Adjusted Gift Total does not equal zero after subtracting each of the designation/recognition totals for an adjusted gift	Adjust Amt of Gift <i>Number</i> not distributed
If the Pledge Total does not equal zero after subtracting each of the designation/recognition totals for a pledge	Pledge Amt of Pledge <i>Number</i> not distributed
If the Adjusted Pledge Total does not equal zero after subtracting each of the designation/recognition totals for an adjusted Pledge	Adjust Amt of Pledge <i>Number</i> not distributed
If the Membership Total does not equal zero after subtracting each of the designation/recognition totals for a membership	Total Amt of Membership <i>Number</i> not distributed
If the Adjusted Membership Total does not equal zero after subtracting each of the designation/recognition totals for a membership	Adjust Amt of membership not distributed

Reason	Message
If the Tender Item Type is not set up correctly	Item type not defined for Tender
If a transaction is missing a designation	DESIGNATION Missing for Gift Nbr
If a designation is set up without an Item Type	Item Type Missing for Designation
If a membership transaction is missing a designation	DESIGNATION Missing for Mbr Pmt Nbr
If a membership transaction includes a designation without an Item Type	Designation ITEM_TYPE Missing for Designation
If an Item Type does not include a valid GL Interface record	GL Interface missing for Item Type
If the designation's Item Type DB/CR Indicator is not set correctly to build a dual accounting line	DB/CR Indicator incorrect for Item Type
If the Item Type's GL Interface record does not include a valid business unit	GL Interface BUSINESS_UNIT Missing for Item Type
If a designation is included in a transaction that is no longer active	Active Designation not found

If any of these errors occur in the GL Interface process, the system rolls back all processing related to the session and sets the AV_SESSION_TBL.SESS_STATUS field to *S*. These sessions appear on the Suspended Sessions page.

To fix the session for reprocessing, the situation underlying each error in the session must be corrected before balancing, queuing, and running the GL Interface process again. For example, if a designation is missing an item type, you have two choices.

You must either update the designation fund record by adding an item type on the Designation Funds page, or select a different designation for the transaction in the entry page of the session for the transaction that erred.

Open

Click to re-open the session for editing. After re-opening the session, go to the Gift Entry, Pledge Entry, Member Entry, Adjust Gift, Adjust Pledge, or Adjust Member page to correct the problem within a session.

To correct the setup values, go to the appropriate page – Item Type, Designation Funds, Tender Type, or CR Business Unit – and make the change.

Viewing Information About and Transferring Sessions

Use the Session Filter and Session Summary pages to view information about existing sessions. The Session Filter page enables you to select criteria to narrow the number of sessions you view, and the Session Summary page displays summaries of the sessions matching your selection criteria. From the Session Summary page, you can reopen sessions that have been balanced, make changes to the transactions in a session, or transfer sessions to new users if you have gift and pledge supervisor status on the Staff Roles page.

This section discusses how to:

- Filter sessions.
- View a session summary.
- Transfer sessions.
- Re-open and edit expected counts and amounts for sessions.

Pages Used to View and Transfer Session Information

Page Name	Object Name	Navigation	Usage
Session Filter	AV_SESS_FLTR	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Inquire2, Session Summary, Session Filter • Manage Contributor Relations, Manage Memberships, Inquire, Session Summary, Session Filter 	Select criteria to narrow the number of sessions you view on the Session Summary page.
Session Summary	AV_SESS_SMRY	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Inquire2, Session Summary, Session Summary • Manage Contributor Relations, Manage Memberships, Inquire, Session Summary, Session Summary 	View information about sessions.
Transfer	AV_SESS_TRSFR_SP	Click the Transfer Session link on the Session Summary page.	Transfer a session from one user to another.

Filtering Sessions

Access the Session Filter page.

Session Filter

Session Summary

Institution:

PSUNV

PeopleSoft University

Business Unit:

User ID:

PS

Session Status:

Open

Session Type:

Self Service Session

☐

Search

Item

From

To

Date Opened:

Post Date:

Balance Date:

Actual Total Count:

Actual Total Amount:

USD

Session Filter page

Business Unit	Enter the business unit for which to view session information.
Session Status	Select a valid session status, such as <i>Open</i> , <i>Balanced</i> , <i>Posted</i> , <i>Queued</i> , or <i>Suspense</i> . If you do not specify a session status, the Session Summary page displays all sessions, regardless of session status. Field values are delivered with your system as translate values. Do not modify these translate values in any way. Any modifications to these values will require a substantial programming effort.
User ID	Displays the ID of the person who controls the session. <div>Note. This field is only available for selection if you are a gift and pledge supervisor; otherwise, your user ID appears here.</div>
Session Type	Select a valid session type, such as <i>Gift</i> , <i>Pledge</i> , <i>Gift Adjustment</i> , <i>Pledge Adjustment</i> , <i>Member</i> , or <i>Member Adjustment</i> . If you do not specify a session type, the Session Summary page displays all sessions, regardless of session type. Session types are delivered with your system as translate values. Do not modify these translate values in any way. Any modifications to these values will require a substantial programming effort.
Self Service Session	Select to filter for gifts made through the Involvement online giving process.
Date Opened, Post Date, and Balance Date	Enter a date opened, post date and balance date range. Select the earliest date in the range from the From prompt box, and the latest date in the range from the To prompt box. A post date range is the date range in which sessions were posted in the GL Interface process. A balance date range is the date range in which sessions were balanced in your system. The sessions matching your date ranges display on the Session Summary page.

Important! To filter transactions for an exact date, enter the same value in both the from and to fields.

Actual Total Count and Actual Total Amount

Enter an actual total count and actual total amount range. Enter the lowest count or amount in the From field, and the highest count or amount in the To field. An actual total count range specifies the number of transactions contained in a session. The actual total amount range specifies the monetary total of a session. The sessions matching the ranges you enter display on the Session Summary page.

Search

Click to retrieve a list of results matching your selection criteria.

Note. The Maximum Retrieval value, set on the Institution Installation page, determines the maximum number of results returned per search.

Viewing a Session Summary

Access the Session Summary page.

Session Filter Session Summary

Total Count: 6 Total Amount: 19,044.35 USD

Expected	Session Number	Business Unit	Session Type	Session Status	User ID	Date Opened	Balance Date	Post Date	Actual Count	Actual Amount	Self Service Session
Expected	123	MEDBU	Gift Adj	Open	PS	10/22/2001				0.00 USD	
Expected	125	MEDBU	Gift	Open	PS	10/22/2001			1	344.35 USD	
Expected	127	MEDBU	Pledge Adj	Open	PS	10/22/2001			1	15,000.00 USD	
Expected	152	MEDBU	Member	Open	PS	03/29/2002			1	100.00 USD	
Expected	167	MEDBU	Pledge Adj	Open	PS	04/02/2002			1	1,200.00 USD	
Expected	168	MEDBU	Gift	Open	PS	04/02/2002			1	1,200.00 USD	

Session Summary page

If you are a Gift and Pledge Supervisor, you can reopen and transfer sessions using this page.

Expected

Click to re-open the Expected Count and Expected Amount fields on the Maintain Sessions page for editing. You must be assigned the role of gift and pledge supervisor through the Staff Roles page to access this button.

See Chapter 23, “Processing Commitments and Analyzing Giving History,” Re-Opening and Editing Expected Counts and Amounts for Sessions, page 457.

Self Service Session

Indicates the gifts in the session that were created as a result of online giving.

See Also

Chapter 22, “Entering Commitments,” Initializing and Balancing the Session, page 374

Transferring Sessions

Access the Transfer page.

Transfer

From

User ID: PS
Carroll, Bruce

To

Operator ID:

OK **Cancel**

Transfer page

Sessions are tied to User ID; essentially, they are “owned” by the person who creates them. A gift and pledge supervisor or membership supervisor may need this page to transfer a session from one user to another, for example because the owner could not finish the data entry for one reason or another.

Operator ID Enter the ID of the user to whom to transfer the session.

Re-Opening and Editing Expected Counts and Amounts for Sessions

If you try to balance a session on the Maintain Sessions page and you discover data entry errors that prevent you from balancing the session, you must correct the erroneous expected counts and amounts so that the session can balance. However, for security reasons, once you enter and save expected counts and amounts, the system locks them so that they cannot be changed without intervention. Therefore, to correct erroneous data you must re-open the expected counts and amounts for the session on which you are working. Note, however, that only individuals at your institution who have been assigned the role of Gift and Pledge Supervisor (GPS) or Member Supervisor (MS) on the Staff Roles page can re-open expected counts and amounts for a session. Thus, you must first assign an individual the GPS staff role, and then that person can re-open the expected counts and amounts.

Note. To re-open expected counts and amounts within a session, the session cannot have been queued for posting, nor can it have been posted through the GL Interface process.

To re-open expected counts and amounts:

1. Add an ID for the person who will be assigned the GPS role (if not already in the system).
To add IDs, select Design Student Administration, Define Contributor Relations, Setup, Staff.
2. Assign the person the GPS role.

Insert a row on the Staff Roles page, select the GPS role, and save the page.

To assign roles, select Design Student Administration, Define Contributor Relations, Setup, Staff Roles.

Note. If you are logged in as the ID to which you just assigned the GPS role, you do not have to log out to continue this procedure.

3. Select filter criteria on the Session Filter page and search for the session to be re-opened.

Your search criteria might return multiple sessions, which is fine.

To select filter criteria, select Manage Contributor Relations, Enter Commitments, Inquire2, Session Filter.

4. Re-open the expected counts and amounts.

Go to the Session Summary page. If you are logged onto the system as the GPS you have additional buttons such as Expected and Open, and a Transfer link. The buttons and links you see depend on the state of the session. Locate the row of the session to re-open and click the Expected button in that row. A message appears that indicates that the session has now been re-opened.

To access the Session Summary page, enter your criteria on the Session Filter page and click the Search button.

5. Edit the expected counts and amounts.

Go to the Maintain Gift Sessions, Maintain Pledge Sessions, or Maintain Membership sessions page (depending on what you are working on). Upon entering this page be sure to select the session that you just re-opened. The Expt Cnt (expected count) and Expt Amt (expected amount) fields are now available for input. You can now edit these fields.

To access the Maintain Sessions pages, select Manage Contributor Relations, Enter Commitments, Use, Maintain Gift Sessions, or Manage Contributor Relations, Enter Commitments, Use, Maintain Pledge Sessions, or Manage Contributor Relations, Managing Membership, Use Maintain Membership Sessions.

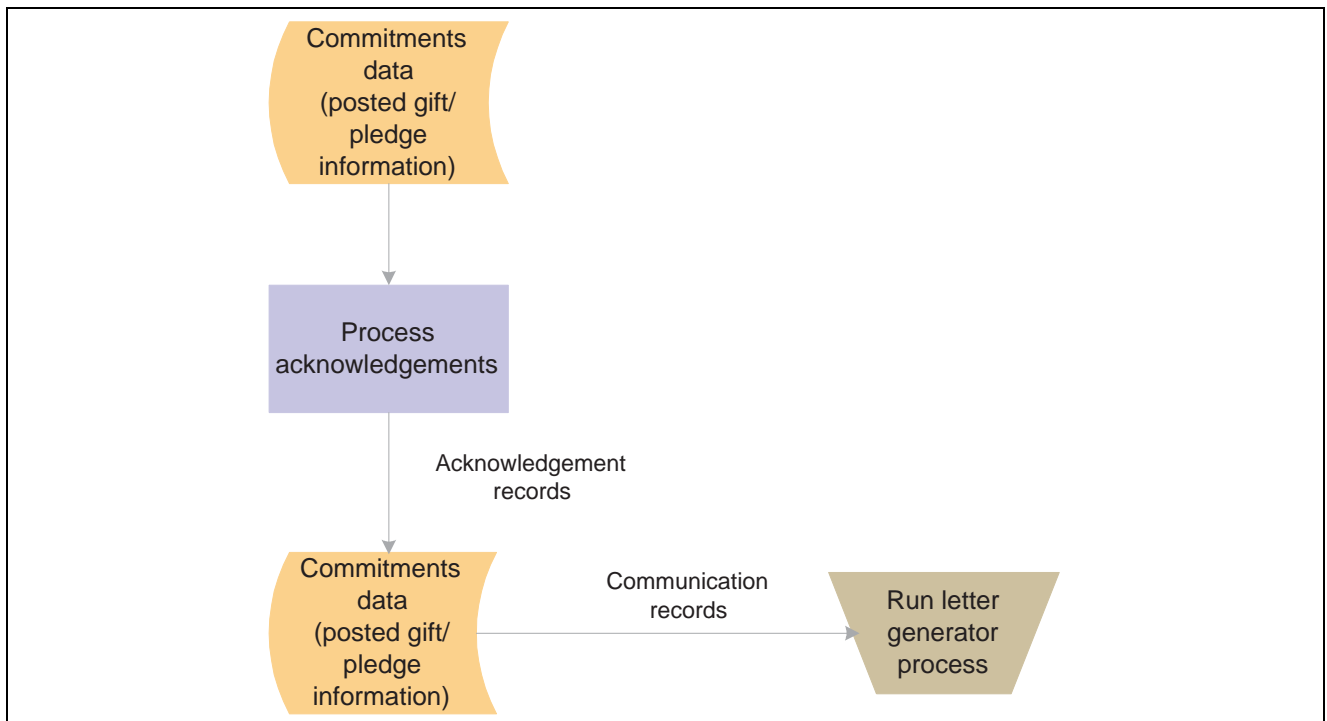
Note. Once the fields are edited and saved, you would need to perform Steps 3 and 4 again to re-open the session for editing.

Managing the Acknowledgement Process

In PeopleSoft Contributor Relations, acknowledgement letters and receipts are either queued automatically based on parameters you define when you set up your system or queued manually. Once they are queued, communications are generated using the letter generator process.

Before you run the acknowledgement process you must first define the acknowledgement and letter setup for the institution and establish joint relationships. All gifts and pledges to be acknowledged must be posted through the GL Interface process.

The following diagram represents the way acknowledgement information feeds into the joint letter generation process:



Acknowledgement process into letter generation

The 3Cs Engine generates joint communications for acknowledgement letters and receipts. Once the communications record exists, you can run the Letter Generator process. The 3C Engine runs through a series of rules to determine which records are joined and should receive joint communications. Any remaining unjoined records receive individual communications. The Letter Generator creates a Comma Separated Values (.csv) file containing data needed to generate both joint and individual letters. The .csv file can be merged with a Microsoft Word template to produce actual letters.

Understanding How the Acknowledgement Generation Process Works

When acknowledgements are processed, the system runs a series of checks to determine which letters a donor should receive.

Those steps include:

1. The system runs through each item you prioritized on the Institution Installation 2 page. On that page, you entered numbers to represent the priority for sending acknowledgement letters. The priority you set determines which acknowledgement setup parameters are looked at first to determine which letter a donor receives. For each item you prioritized, the system checks the acknowledgement rules and either generates a communications record, assigns the acknowledgement to a role, or assigns it to suspense.
2. The system looks at the designation fund set up for each designation to which the donor gave. If an acknowledgement event ID is assigned to a designation fund, a communications record is generated. If a role is assigned to a designation fund, the acknowledgement is assigned to staff members with that role.

Note. If the Anonymous check box is selected on the Recognition page when entering a transaction, the system does not run these checks and does not produce an acknowledgement letter.

Understanding Joint Acknowledgements and Spousal Relationships

The Joint Letter Generator follows specific rules regarding spousal relationships when generating acknowledgements and receipts. You must be careful when defining defaults for gift recognition splits between spouses to ensure that gifts are properly acknowledged.

Note. To make spouses jointly acknowledged, you must establish a joint record and set up salutations and a joint address using the Relationships component.

On the Contributor Relations Installation page you can define default split percentages between a donor and spouse for various credit types.

Use the following example to determine how default splits affect joint receipting and acknowledgements.

Example

A donor gives a gift of USD 1,000:

If a joint relationship exists between a donor and spouse and you set the following defaults:

	Donor	Spouse
Hard Credit	50 percent	50 percent
Soft Credit	50 percent	50 percent

the donor and spouse receive a joint receipt for USD 1,000. Depending on how you set up acknowledgement rules, they may also receive a joint acknowledgement for USD 1,000.

If a joint relationship does not exist between a donor and spouse and you set the following defaults:

	Donor	Spouse
Hard Credit	50 percent	50 percent
Soft Credit	50 percent	50 percent

the donor and spouse each receive separate receipts for USD 500. Depending on how you set up acknowledgement rules they may also receive separate acknowledgement letters for USD 500 each. No joint communications are created.

If a joint relationship exists between a donor and spouse and you set the following defaults:

	Donor	Spouse
Hard Credit	100 percent	0 percent
Soft Credit	0 percent	100 percent

the donor and spouse receive a joint receipt for USD 1,000. Depending on the acknowledgement rules you set up and whether the Acknowledge Soft Credit check box is selected on the Institution Installation 2 page, they may also receive a joint acknowledgement for USD 1,000.

Note. We recommend that you use this configuration to ensure sending the appropriate acknowledgement letter for the highest hard credit recognized. The system adds hard credits for joint records together, but the letter code for the acknowledgement is selected based on an individual's hard credit rather than the joint hard credit calculation.

If a joint relationship does not exist between a donor and spouse and you set the following defaults:

	Donor	Spouse
Hard Credit	100 percent	0 percent
Soft Credit	0 percent	100 percent

the donor receives a receipt for USD 1,000. The donor may also receive an acknowledgement letter for USD 1,000. Depending on the acknowledgement rules you set up and whether the Acknowledge Soft Credit check box is selected on the Institution Installation 2 page, the spouse may receive an acknowledgement for USD 1,000 indicating zero charitable amount. No joint communications are created.

See Also

PeopleSoft 8 SPI Campus Community Fundamentals PeopleBook, “Managing Communications,” Understanding Joint Communications

[Chapter 2, “Setting Up Your PeopleSoft Contributor Relations Framework,” Setting Up Institution Defaults, page 10](#)

Processing Acknowledgement Letters

This section discusses how to automatically process acknowledgment letters.

Page Used to Process Acknowledgement Letters

Page Name	Object Name	Navigation	Usage
Process Acknowledgement	AV_RUNCTL_ACKNLDG	Manage Contributor Relations, Enter Commitments, Process, Process Acknowledgements, Process Acknowledgements	Process the acknowledgement letters that are queued automatically based on the setup parameters you set for acknowledgements.

Processing Acknowledgements Automatically

Access the Process Acknowledgements page.

Process Acknowledgements page

Business Unit Enter the business unit for which to process acknowledgements.

Commit Level Determine how many sessions for which acknowledgement letters are processed before the system commits them to the database.

If the process is set up, when you click the Run button, the system runs the Acknowledgement Processing process at user-defined intervals.

Generating Acknowledgement Letters

Access the Letter Generation page (Manage Contributor Relations, Enter Commitments, Process, Letter Generation).

PeopleSoft Contributor Relations uses PeopleSoft Campus Community's letter generation process to generate acknowledgement letters once they've been processed.

See *PeopleSoft 8 SPI Campus Community Fundamentals PeopleBook*, "Managing Communications," Understanding Letter Generation.

Working With Manually Generated Acknowledgements

You can set up parameters so that acknowledgement letters are automatically generated based on a donor's service indicators, gift amounts, and so on. However, some commitments do not fall into the parameters of these defaults, so those acknowledgements are assigned to a staff member or a suspense file and written or processed separately.

This section discusses how to:

- View acknowledgements in suspense.
- View acknowledgement details.
- Transfer an acknowledgement.
- View acknowledgement lists.

Pages Used to Work With Manually Generated Acknowledgements

Page Name	Object Name	Navigation	Usage
Acknowledge Suspense	AV_ACKNLDG_SPSNS	Manage Contributor Relations, Enter Commitments, Use, Acknowledgement Suspense, Acknowledge Suspense	View a list of all the acknowledgements assigned to suspense, transfer acknowledgements to other staff members, and access the page used to process acknowledgement letters.
Acknowledgement Detail	AV_ACKNLDG_DTL_SP	Click the Process button on the Acknowledgement Suspense or Acknowledgement List page.	Process acknowledgements letters that were placed in suspense or assigned to you.
Transfer	AV_ACKNLDG_TRNS_SP	Click the Transfer button on the Acknowledgement Suspense or Acknowledgement List page.	Transfer acknowledgements assigned to yourself or suspense to other staff members at your institution.
Acknowledgement List	AV_ACKNLDG_LIST	Manage Contributor Relations, Enter Commitments, Use, Acknowledgement List, Acknowledgement List	View a list of all the acknowledgements assigned to your role, transfer acknowledgements to other staff members, and access the page used to process acknowledgements.

Viewing Acknowledgements in Suspense

Access the Acknowledge Suspense page.

Acknowledge Suspense

Institution: PSUNV PeopleSoft University

Select	Gift Nbr	Acknowledgement Type	ID	Constituent	Suspense Reason	Process Button
<input checked="" type="checkbox"/>	276	Gift	AV3000	Sufi PhD,Hala Ann	No Acknowledgement Criteria	Process

View All First 1 of 1 Last

Transfer

All **Workset:** **Descr:**

Acknowledge Suspense page

Important! Acknowledgements are assigned to suspense if they do not fall into any of the setup parameters established when defining acknowledgement rules. They are also assigned to suspense if they are assigned to a role and there is not a resource assigned to that role.

- Select** Select each record for which to transfer acknowledgements.
- Process** Click to process acknowledgement letters on the Acknowledgement Detail Page.
- Transfer** Click to assign the acknowledgement to another staff member on the Transfer Page.

If there is a gift level range (such as gifts less than USD 50) for which only a receipt should be produced, be sure to include a row in the gift level portion of the Acknowledgement setup to manage this. To produce only a receipt, set the No Receipt flag to *Yes* and select the same Event ID that is selected for your receipt. The system generates a receipt but does not produce an acknowledgement letter. If you do not do this the acknowledgement process sends everything in the acknowledgement list to the manual acknowledgement suspense process.

You can build a workset from this page.

See Also

Chapter 3, “General Functions Used Throughout the System,” Building a Workset From a Page in the System, page 39

Viewing Acknowledgement Details

Access the Acknowledgement Detail page.

Acknowledgement Detail (14305,77)

ID: AV3000 Sufi PhD,Hala Ann

Date: 07/23/2001 ☐ **In Honor/In Memory**

Commitment Type: GIFT

Tender Type:

Amount: 5.00

Letter

☐ **Standard** ☐ **Custom** ☒ **None**

Acknowledgement Detail page

When you process a letter you have the options of selecting and generating a standard letter, assigning a customized letter, or choosing not to send a letter.

Standard

If selected, indicates that you will generate your institution's standard acknowledgement letter for this commitment. You are prompted to select an event ID and a communication record is written so that a letter is generated when you next run the letter generation process. The system deletes the record from the AV_ACKNLGD_DTL table upon saving this page.

Custom

If selected, indicates that you will generate a custom acknowledgement letter for this commitment. You are prompted to select an event ID. In addition, a text box displays where you can type comments about the custom letter that you are going to create for the donor. You can view these notes when you view information about the communication record. A communication record is written and marked as complete. The system deletes the record from the AV_ACKNLGD_DTL table upon saving this page. You do not generate a custom letter by running the letter generation process. Custom letters must be generated manually.

None

If selected, indicates that you do not want to generate an acknowledgement letter for this commitment. The system deletes the record from the AV_ACKNLGD_DTL table and does not write a communication record. The record no longer displays in your acknowledgement list or acknowledgement suspense.

Note. We recommend that your institution create an event ID for the purpose of generating custom acknowledgements. The letter code you assign can be a "generic" or blank letter code, since it is not actually used to generate letters. Creating this event ID ensures that a communications record is generated for custom acknowledgements, enabling you to track the communication.

Transferring an Acknowledgement

Access the Transfer page.

Transfer

To

User ID:

Carroll,Bruce

Transfer page

Enter the User ID of the person you are assigning the acknowledgement to. The acknowledgement is immediately assigned to the individual you select. If you have selected a group of donors to transfer to another user, all selected acknowledgements will be immediately assigned to the individual you select.

Viewing Acknowledgement Lists

Access the Acknowledgement List page.

Acknowledgement List

Institution: PSUNV PeopleSoft University **User ID:** PS

Select	Gift Nbr	Acknowledgement Type	ID	Constituent	Process Button
<input type="checkbox"/>	250	Gift	AV0001	Gallegher,Shawn	

[View All](#) First 1 of 1 Last

Workset:

Descr:

Acknowledgement List page

Note. If more than one person at your institution is assigned to one role, the acknowledgement appears on the acknowledgement lists of each person with that role. When you complete the acknowledgement, it is removed from the acknowledgement lists of all people with that role so a second letter is not accidentally sent.

Select Select each record for which to transfer acknowledgements.

Process Click to process acknowledgement letters on the Acknowledgement Detail Page.

Transfer

Click to assign the acknowledgement to another staff member on the Transfer Page.

You can build a workset from this page.

See Also

Chapter 3, “General Functions Used Throughout the System,” Building a Workset From a Page in the System, page 39

Managing Joint Communications

PeopleSoft Contributor Relations provides the ability to communicate with constituents jointly to a common address rather than producing individual communications for each constituent. For example, you can invite a married couple or two roommates to an event by sending a single invitation to their joint address.

Use the joint communication features on the Relationships and Communications pages to create joint communication for two individuals when at least one of the individuals exists in your database. To set up Joint Communications you must first set up joint salutations, establish a joint relationship, and identify the address to use for the joint communication.

There are two areas in PeopleSoft Contributor Relations from which joint communications can be triggered: acknowledgements and receipting, and membership organizations and initiatives. In either instance, the 3C Engine process creates the communication record.

The 3C engine evaluates the selected joint options and determines which records are joined and should receive joint communication. Any remaining unjoined records receive individual communications. Once the communication record exists, you can run the Letter Generator.

Note. The Joint Communications feature expands upon the functionality found in PeopleSoft Campus Community’s Letter Generator. No functionality has been removed from Letter Generator to create the Joint Communications feature.

The following is a list of the communication variable data that the system uses to determine whether or not to send a joint communication:

- Session_No
- Gift_no
- Recognition_type
- Designation
- Intv_cd
- AV_audience
- Aud_type
- Membership_nbr
- AV_mbr_org_cod

- Av_std_ben
- Mbr_pmt_no

See Also

PeopleSoft 8 SPI Campus Community Fundamentals PeopleBook, “Managing Communications,” Understanding Joint Communications

Handling Matching Gifts

This section discusses how to:

- View an organization’s matching gift rules.
- View an organization’s matching gift restrictions.
- View information about outstanding matching gifts.
- View expected matching gifts.
- View matching gifts for a person.
- View matching gifts for an organization.

Understanding Matching Gifts

Many of the donations donors make can be matched by their employers or by other organizations they are affiliated with. You can track information about the types of gifts organizations match, then have the system calculate a “best guess” of the potential matches for a particular gift. You can modify that “best guess” to reflect the actual matching amount expected for a gift, then track actual matching payments or denied matches against your expectations.

In addition, you can track the matching gift forms that must be submitted before some organizations match a gift.

The process works as follows:

1. Your institution enters information about an organization’s matching gift rules and the match ratios for particular programs and gift amounts.
2. A donor gives a gift. The system checks for potential matching organizations based on the donor’s relationships, current work experience, and whether he or she is a qualified contact of an organization. When any one of these criteria exist, the system makes a “best guess” at what the matching gift will be taking into consideration the organization’s minimum requirements for amount, ineligible designation matching gift types, ineligible gift types, and match ratio. These expected matches display on the Outstanding Matching Gifts and External Organization Matching Gifts pages.
3. If they have not already, the donor may need to submit a matching gift form. Indicate the date the form was received on the Outstanding Matching Gifts Page or the External Organization Matching Gifts page. Not all matching gift organizations require this step.
4. The organization makes a matching gift. When entering the organization’s gift, you can select from a system-generated list of the donors expecting matching gifts from the organization, then indicate which original donations are being matched. Alternately,

-OR-

You mark the expected match record as “Denied,” and it no longer appears as a current expected match.

Understanding Matching Gift Processing and Foreign Currencies

Matching gifts rules can be defined in any currency, and a donor can give a gift in any currency. However, all gift amounts are converted to your institution’s base currency when transactions are stored. Expected match amounts for gifts where a matching gift is expected are determined as described in the following scenarios:

Assumption for these scenarios: The Institution Base Currency is USD.

Scenario 1: The Gift and the Matching Rules are in Institution Base Currency

The matching gift ratios are set up as follows:

Ratio	Currency	From Amount	To Amount
2:1	USD	0	1,000
1:1	USD	1,001	5,000

A gift of USD 500 is made to the institution. The expected and received match is USD 1,000.

Scenario 2: The original Gift is in Institution Base Currency and the Matching Gift is not

The matching gift ratios are set up as follows:

Ratio	Currency	From Amount	To Amount
2:1	USD	0	1,000
1:1	USD	1,001	5,000

A gift of USD 500 is made to the institution. The system expects a match of USD 1,000, but receives a match of CAD 1,300. The system converts the matching gift to USD using the exchange rate between CAD and USD on the gift date. This rate can be overridden during the gift entry process.

Scenario 3: The Gift and the Matching Rules are not in Institution Base Currency

The matching gift ratios are set up as follows:

Ratio	Currency	From Amount	To Amount
2:1	EUR	0	1,000
1:1	EUR	1,001	5,000

A gift of CAD 500 is made to the institution. The system converts the gift amount to the base currency of USD. The system also converts the matching gift rules to the base amount of USD as of the gift date, and applies the converted gift amount to the converted matching gift rules. The expected match amount is always generated in the base currency code.

Scenario 4: The Gift is not in Institution Base Currency, but is in Matching Rules Currency

The matching gift ratios are set up as follows:

Ratio	Currency	From Amount	To Amount
2:1	EUR	0	1,000
1:1	EUR	1,001	5,000

A gift of EUR 500 is made to the institution. A matching gift of EUR 1,000 is expected/received. The system converts the expected/received matching gift amount to USD as of the gift date.

Pages Used to Handle Matching Gifts

Page Name	Object Name	Navigation	Usage
Rules	AV_MTCH_RULES_INQ	<ul style="list-style-type: none"> Manage Contributor Relations, Enter Commitments, Inquire, Matching Rules, Rules Manage Contributor Relations, Manage Organizations, Inquire, Matching Rules, Rules Manage Contributor Relations, Manage Organizations, Workset, Matching Rules, Rules 	View information about an organization's match amount, ratios, and budget rules.

Page Name	Object Name	Navigation	Usage
Restrictions	AV_MTCH_RULES2_INQ	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Inquire, Matching Rules, Restrictions • Manage Contributor Relations, Manage Organizations, Inquire, Matching Rules, Restrictions • Manage Contributor Relations, Manage Organizations, Workset, Matching Rules, Restrictions 	View information about the eligible and ineligible designation type, gift types, alumni statuses, and employee statuses for an organization's matching gift program.
Required Info/Contacts (required information/contacts)	AV_MTCH_RULES3_INQ	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Inquire, Matching Rules, Rqd Info/Contacts • Manage Contributor Relations, Manage Organizations, Inquire, Matching Rules, Rqd Info/Contacts • Manage Contributor Relations, Manage Organizations, Workset, Matching Rules, Rqd Info/Contacts 	View the information required by the organization before matching a gift, as well as the matching gifts contact people at the organization.
Outstanding Matching Gifts	AV_MTCH_P_LIST	Manage Contributor Relations, Enter Commitments, Use, Person Matching Gift, Outstanding Matching Gifts	View information about the expected matching gifts resulting from a donor's gifts.
Ext Org Matching Gift (external organization matching gift)	AV_MTCH_O_LIST	Manage Contributor Relations, Enter Commitments, Use, Ext Org Matching Gift, Ext Org Matching Gift	View the gifts that an organization is expected to match and to mark a matching gift as denied.
Person Matching Gifts	AV_MTCH_P_INQ	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Inquire, Person Matching Gifts • Manage Contributor Relations, Analyze Giving History, Inquire, Person Matching Gifts 	View information about donors' gifts that are matched by external organizations.

Page Name	Object Name	Navigation	Usage
Ext Org Matching Gift (external organization matching gift)	AV_MTCH_O_INQ	<ul style="list-style-type: none"> Manage Contributor Relations, Enter Commitments, Inquire, Ext Org Matching Gifts Manage Contributor Relations, Analyze Giving History, Inquire, Ext Org Matching Gifts 	View information about donors' gifts that an organization has matched or declined to match.

Viewing an Organization's Matching Gift Rules

The Matching Rules inquiry component enables you to view the matching gift rules defined for an organization. You can view information about minimum match amounts and match ratios, the designations for which gifts can be matched, the annual matching gift budget, required information and contacts, and any matching gift restrictions the organization has.

Access the Rules inquiry page.

Rules Restrictions Rqd Info/Contacts

Ramesy, Riley & Roscoe Cnsltng

ID: SAC0013

Min Amt: 100.00 USD

MG Designation Type: Any Eligible

*Receipts: Periodically

Distribution Schedule: Annually

Distribution Date: 03/01

Deadline Date:

Last Modification Date: 05/01/2001

Annual Matching Gift Budget

Overall Total:	500,000.00
Donor/Institution Total:	5,000.00
Institution Total:	30,000.00
Donor Total:	10,000.00

☐ Payroll Eligibility
☒ Duplicate Match

Matching Gift Ratio

View All First 1-2 of 2 Last

Ratio	Min Amt	Max Amt
1.00: 2.00	0.00	3,000.00
1.00: 1.00	3,000.01	5,000.00

Rules inquiry page

Min Amt (minimum amount)

Displays a minimum amount for gifts that the organization will match. The organization will only match gifts that are equal to or greater than the amount in this field.

MG Designation Type
(matching gift designation type)

Indicates the designation to which matching gift funds must be applied when they are received. This field enables you to determine to what designations a matching gift company's payment should be allocated.

Receipts

Displays receipt options.

Periodically: receipts may be combined and sent to the organization periodically.

Each Gift: the organization requires a receipt from your institution for each company gift.

Distribution Schedule	Displays the frequency with which organizations make matching gift payments to your institution.
Deadline Date	Displays the date on which a completed matching gift form must be received by the organization in order for it to match the gift.
Overall Total	Displays the organization's annual matching gift budget. This amount represents the total amount the organization will donate in matching gift payments to your institution as well as other institutions for the current year.
Donor/Institution Total	Displays the maximum monetary amount the organization will match toward one donor's gifts to your institution this year
Institution Total	Displays the maximum monetary amount the organization will give to your institution in matching gift payments this year.
Donor Total	Displays the maximum amount the organization will pay in matching gifts for donations made by one donor to your institution as well as other institutions this year.
Payroll Eligibility	Indicates the organization offers employees the option of having payroll deduction gifts matched through its matching gift program.
Duplicate Match	Indicates the organization matches gifts that are matched by other organizations.
Ratio	Displays the formula by which an organization calculates the amount it will match for each regular donor gift to your institution.
Min Amt and Max Amt (minimum amount and maximum amount)	Displays amounts used in the automatic calculation of the expected matching gift amount.

Viewing an Organization's Matching Gift Restrictions

Access the Restrictions inquiry page.

Rules Restrictions **Rqd Info/Contacts**

Ramesy, Riley & Roscoe Cnsltng ID: SAC0013

Ineligible Designation Types View All First 1-2 of 3 Last

- Athletic Activities & Programs
- Athletic Building Funds

Ineligible Gift Types View All First 1-2 of 3 Last

- Gift-in-Kind
- Life Insurance Policy

Eligible Alumni Status View All First 1 of 1 Last

Eligible Employee Status View All First 1 of 1 Last

All Employees

Comment:

Restrictions inquiry page

Ineligible Designation Types

Displays the designation types that are not eligible for an organization's matching gift program.

Ineligible Gift Types

Displays the certain gift types that the organization will not match

Eligible Alumni Status

Displays the status a donor must have as a formal student of your institution in order for the organization to match gifts.

Eligible Employee Status

Displays the status a donor must have as an employee at the organization for it to match gifts.

Viewing Outstanding Matching Gifts

Access the Outstanding Matching Gifts page.

Outstanding Matching Gifts

Whitley, Christopher ID: AV0007

Constituent Type: Alumni Yr: 1942 Institution: PSUNV

*Time Frame: Current Business Unit: Refresh

Business Unit	Gift Date	Name	Expected Match Amount	Actual Match Amount	Process Date	Denied Date	Details
1 MEDBU	07/24/2001	American Enrichment Foundation	1,500.00		07/24/2001		Details

Outstanding Matching Gifts page

Business Unit

Enter the business unit for which to view a donor's gifts with outstanding matches. The outstanding matching gifts that fall within the parameters you select appear on this page.

- Process Date

Displays the date the matching gift form was submitted to the matching gift organization.
- Denied Date

If the matching gift is denied by the matching organization, enter the date that you received the denial.
- Details

Click to view detailed information about a particular gift on the Gift Detail page.





Viewing Expected Matching Gifts

Access the Ext Org Matching Gift page.

Ext Org Matching Gift

Ford Motor Company

ID: AV1000




Constituent Type: Foundation

Institution: PSUNV

*Time Frame: Current

Business Unit:

Refresh

View All							First	1 of 1	Last
Business Unit	Gift Date	Name	Expected Match Amount	Actual Match Amount	Process Date	Denied Date	Details		
1 PSUNV	08/01/2001	Sufi PhD,Hala Ann	27,489.50		07/23/2001			Details	

Ext Org Matching Gift page

- Business Unit

Enter the business unit at your institution for which to view the organization’s expected matching gifts. The matching gift records that fall within the time frame and business unit you select display on this page.
- Process Date

The date on which the matching gift is processed.
- Denied Date

Enter the date on which the matching gift is denied if applicable.
- Details

Click to view detailed information about the particular gift that’s potentially being matched on the Gift Detail page.




Viewing Matching Gifts for People

Access the Person Matching Gifts page.

Person Matching Gifts

Whitley,Christopher

ID: AV0007


Constituent Type: Alumni

Yr: 1942

Institution: PSUNV

*Time Frame:

Current

Business Unit: 

Refresh

						View All	First <div>1</div> of 1 <div>Last</div>
Business Unit	Gift Date	Org ID	Name	Expected Match Amount	Actual Match Amount	Denied Date	Details
1 MEDBU	07/24/2001	AV1012	American Enrichment Foundation	1,500.00			Details

Total Expected Amount:

1,500.00 USD

Total Actual Amount:

0.00 USD

Total Count:

1

Person Matching Gifts page

- Business Unit

Displays the business unit associated with the expected matching gift.
- Gift Date

Displays the date on which the gift was made to your institution.
- Expected Match Amount

Displays the monetary amount you expect to receive as a matched gift from the organization for the donor’s original gift.
- Actual Match Amount

Displays the monetary amount actually received as a matching gift payment.
- Denied Date

Displays the date on which the matching gift was denied, if applicable.
- Details

Click to open the Gift Detail page, where you can view detailed information about the particular gift that’s potentially being matched.

See Also

Chapter 23, “Processing Commitments and Analyzing Giving History,” Viewing Expected Matching Gifts, page 475

Viewing Matching Gifts for an Organization

Access the Ext Org Matching Gifts inquiry page. The fields on this page are the same as those on the Person Matching Gifts page.

See Chapter 23, “Processing Commitments and Analyzing Giving History,” Viewing Matching Gifts for People, page 475.

Managing Giving Clubs

This section discusses how to:

- Manually generate giving club memberships.

- Automatically process giving club memberships.
- Track giving club progress.
- View a giving club summary.
- View a giving club membership summary.
- View giving club progress.

Understanding Giving Clubs

You can define the giving clubs, their levels, and their membership rules.

Once clubs are created, membership is generated by the system using the Process Giving Clubs routine. When a donor reaches the required giving level for a giving club membership, he or she becomes a member of the club.

You can track information about the members of each giving club at your institution as well as information about the progress and structure of each giving club.

Pages Used to Manage Giving Clubs

Page Name	Object Name	Navigation	Usage
Giving Club Membership	AV_GCLUB_MBR, AV_GCLUB_MBR_E, AV_GCLUB_MBR_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Use, Giving Club Membership • Manage Contributor Relations, Enter Commitments, Use, Giving Club Membership-Org • Manage Contributor Relations, Enter Commitments, Workset, Giving Club Membership 	Manually assign a donor to a giving club.
Process Giving Clubs	AV_RUNCTL_GCLUBS	Manage Contributor Relations, Enter Commitments, Process, Process Giving Clubs	Run the AVPGCLUB process that generates giving club memberships and calculates membership levels based on donors' giving.

Page Name	Object Name	Navigation	Usage
Giving Club Progress	AV_GCLUB_PRG, AV_GCLUB_PRG_E, AV_GCLUB_PRG_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Inquire, Giving Club Progress • Manage Contributor Relations, Enter Commitments, Inquire, Giving Club Progress-Org • Manage Contributor Relations, Enter Commitments, Workset, Giving Club Progress • Manage Contributor Relations, Analyze Giving History, Inquire, Giving Club Progress • Manage Contributor Relations, Analyze Giving History, Inquire, Giving Club Progress-Org • Manage Contributor Relations, Analyze Giving History, Workset, Giving Club Progress 	View information about a donor's progression through giving clubs and various club levels at your institution.
Giving Club Summary	AV_GCLUB_SMRY	<ul style="list-style-type: none"> • Manage Contributor Relations, Analyze Giving History, Inquire, Giving Club Summary, Giving Club Summary • Manage Contributor Relations, Enter Commitments, Inquire2, Giving Club Summary, Giving Club Summary 	View a list of all the giving clubs at your institution.
Giving Club Detail	AVB_GCLUB_DTL_SP	Click the Details link on the Giving Club Summary page.	View additional information about a giving club.
Giving Club Level Detail	AV_GCLUB_LVL_SP	Click the Levels button on the Giving Club Summary page.	View information about each giving club level associated with the club.
Giving Club Detail	AV_GCLUB_DTL	<ul style="list-style-type: none"> • Manage Contributor Relations, Analyze Giving History, Inquire, Giving Club Detail, Giving Club Detail • Manage Contributor Relations, Enter Commitments, Inquire2, Giving Club Detail, Giving Club Detail 	View detailed information about a giving club.

Page Name	Object Name	Navigation	Usage
Giving Club Levels	AV_GCLUB_LVL_DTL	<ul style="list-style-type: none"> Manage Contributor Relations, Analyze Giving History, Inquire, Giving Club Detail, Giving Club Levels Manage Contributor Relations, Enter Commitments, Inquire2, Giving Club Detail, Giving Club Levels 	View the associated membership levels for a giving club.
Giving Club Membership Summary	AV_GCLUB_MBR_SMRY	<ul style="list-style-type: none"> Manage Contributor Relations, Analyze Giving History, Inquire, Giving Club Member Summary, Giving Club Membership Summary Manage Contributor Relations, Enter Commitments, Inquire2, Giving Club Member Summary, Giving Club Membership Summary 	View detailed donor information about the members of a giving club.




Manually Generating Giving Club Membership

Access the Giving Club Membership page.




Giving Club Membership


Gallegher, Shawn
Constituent Type: Alumni


ID: AV0001
Yr: 2001





Institution: PSUNV


View All First 1 of 1 Last

Giving Club: ANNUAL  Annual Giving Club  


Fiscal Year: 2001 

Level: SILVER  **Added By:** User

Membership Date: 03/27/2001  **Last Update:**

Giving Club Status: Member 

Amount: 0.00 USD

Description: 

Giving Club Membership page

To assign a donor to a giving club you must be the club’s administrator. Other staff can view membership information on this page, but cannot update information.

Giving Club	Enter the giving club to which to assign the donor. Available options include valid giving clubs at your institution.
Fiscal Year	Enter the fiscal year for the giving club membership. This field populates by default to the current fiscal year, but can be changed.
Level	Enter the level within the giving club that the donor is qualified for. Level names are usually very specific for each institution and defined based on a donor’s level of giving, but an example might include a giving club with levels of <i>Member</i> , <i>Associate</i> , <i>Sponsor</i> , and <i>Benefactor</i> .
Membership Date	Enter the date on which the donor’s membership in the giving club begins.
Giving Club Status	Select the current state of the donor’s status in the giving club. Values for this field are <i>Member</i> or <i>Accruing</i> . Select Member to automatically add the donor to a giving club. Accruing indicates that the donor is still working toward membership eligibility at the level you selected.
Amount	Enter the amount of the donors giving that qualified them for the giving club.

Automatically Processing Giving Club Membership

Access the Process Giving Clubs page.

Process Giving Clubs

Run Control ID: PS

Report Manager

Process Monitor

Run

*Institution:

PSUNV

Process Date:

07/25/2002

Commit Level:

100

Currency Code:

USD

Process Giving Clubs page

Institution	Enter the institution for which giving club records are generated.
Process Date	Enter the date on which the process is run. This field populates by default to today’s date.

Note. AVPGCLUB uses the date you enter to select currently active giving club records. A giving club’s start date, end date, and status are determined on the Giving Club Rules page. AVPGCLUB also uses process date to select giving club eligible designations determined on the Giving Club Rules page.

See [Chapter 12, “Setting Up Commitment Management,” Defining Giving Clubs, page 138.](#)

Commit Level

Enter the number of sessions for which giving club memberships are processed before being committed to the database.

When you run the AVPGCLUB process, the system:

- Checks for any sessions that have not been run through this process to update giving clubs.
- Retrieves the fiscal year value from the gift detail record of each gift. The system uses this fiscal year value to select, insert, or update giving club membership records.
- Applies any recognition a donor received for gifts toward giving club membership. What is included or not included in this calculation is determined by the parameters you set on the Giving Club Rules page for each giving club. Items that may be included toward giving club membership are Gifts, Matching Gifts, Hard Credits, Soft Credits, and Spouse Giving entered through gift and gift adjustment sessions.
- Determines which donors become new members in a giving club and which members move to a different level within a giving club. The memberships are generated and the levels are applied.

Important! If a donor’s giving club eligibility is affected due to a transaction adjustment, the system “backs out” the membership or level change and return the donor to his or her previous status. However, the system does not back out any membership additions or changes that are entered manually through the Giving Club Membership page.

Tracking Giving Club Progress

Access the Giving Club Progress page.

Giving Club Progress

Szymborski,William

ID: DM0040

Constituent Type: Alumni

Yr: None

Institution: PSUNV

Fiscal Year: 2001

Status: Member

Refresh

Name	Level	Amount	Minimum	Maximum
1 Alpha One Club	ALPHA	2,400.00 USD	1,000.00	4,999.99
2 Annual Giving Club	SILVER	1,200.00 USD	1,000.00	0.00

Giving Club Progress page

Fiscal Year

Enter the fiscal year for which to view giving club information. This field populates by default to the current fiscal year, but can be changed.

Status

Select the giving club status to view information about. Values are *Member* or *Accruing*. Member indicates that the donor is currently a member at the level you selected. Accruing indicates that the donor is still working toward membership eligibility at the level you selected.

Minimum and Maximum

Displays the donation range that determine the low and high end of giving to make donors eligible for giving club membership at this level.

Viewing a Giving Club Summary

Access the Giving Club Summary page.

Giving Club Summary

Institution: PSUNV PeopleSoft University

***Time Frame:** Current Search

View All First 1-9 of 19 Last							
Giving Club	Name	Initiative Code	Start Date	End Date	Status	Levels	Details
1 ALPHA	Alpha One Club	ANNFUND	01/01/2000	12/31/2004	Active	Levels	Details
2 ANNUAL	Annual Giving Club		01/01/1900		Active	Levels	Details
3 CENTURY	Century Club	CAMP2000	01/01/1965		Active	Levels	Details
4 TCLUB 9	Test Club Nine		01/01/1900		Active	Levels	Details
5 TCLUB1	Test Club One		01/01/1900		Active	Levels	Details
6 TCLUB10	Test Club Ten		01/01/1900		Active	Levels	Details
7 TCLUB11	Test Club Eleven		01/01/1900		Active	Levels	Details
8 TCLUB12	Test Club Twelve		01/01/1900		Active	Levels	Details
9 TCLUB13	Test Club Thirteen		01/01/1900		Active	Levels	Details

Giving Club Summary page

Levels

Click to view information about the giving club levels associated with each club on the Giving Club Level Detail page.

Details

Click to view detailed information about a giving club on the Giving Club Detail page.

See Also

Chapter 12, “Setting Up Commitment Management,” Defining Giving Clubs, page 138

Viewing a Giving Club Membership Summary

Access the Giving Club Membership Summary page.

Giving Club Membership Summary

Giving Club: ANNUAL Annual Giving Club **Institution:** PSUNV

View All First 1 of 1 Last

Level: SILVER **Start Date:** 01/01/1900 **End Date:** **Status:** Active

Fiscal Year: 2001 **Members:** 0 **Amount:** 0.00

View All First 1 of 1 Last

Select	ID	Name	Amount
1 <input type="checkbox"/>			

Workset: **Descr:**

Giving Club Membership Summary page

Fiscal Year Enter the fiscal year for which to view a list of giving club members.

You can build a workset from this page containing one or more club members.

See Also

[Chapter 3, “General Functions Used Throughout the System,” Building a Workset From a Page in the System, page 39](#)

[Chapter 23, “Processing Commitments and Analyzing Giving History,” Manually Generating Giving Club Membership, page 479](#)

Generating CAE Reports

This section discusses how to generate reports for the Council for Aid to Education (CAE).

Page Used to Generate CAE Reports

Page Name	Object Name	Navigation	Usage
CAE Report (Council for Aid to Education report)	AV_RUNCTL_CAE	Manage Contributor Relations, Enter Commitments, Report, CAE Report, CAE Report	Set the parameters and run the process that generates the standardized CAE report.

Running a CAE Report

Access the CAE Report page.

CAE Report

Run Control ID: TESTCAE+ [Report Manager](#) [Process Monitor](#) [Run](#)

User ID: PS Institution: PSUNV

*Start Date: 01/01/2001

*End Date: 10/21/2002

CAE Report page

The CAE report summarizes gift income by following standards created by the Council for the Advancement and Support of Education (CASE) and the CAE. Generating the report involves running the AVPCAE process, then running any or all of the three processes entitled GIFTINC, GIFTINCII, and GIFTINCIV. The result is a four-part report that provides a comprehensive view of donor giving for a single institution during a specific reporting period.

When you run AVPCAE, the COBOL process gathers data from several tables and writes it to two tables:

- AV_CAE_WRK – holds data for Parts I, II, and III.
- AV_CAE_WRK2 – holds data for Part IV.

When you run GIFTINC, GIFTINCII, or GIFTINCIV, the Crystal processes populate the report cells and calculate the report totals using the data in AV_CAE_WRK and AV_CAE_WRK2.

- GIFTINC creates Parts I and II.
- GIFTINCII creates Part III.
- GIFTINCIV creates Part IV.

Important! You *must* run AVPCAE before running GIFTINC, GIFTINCII, and GIFTINCIV in order for the report to populate correctly.

See Also

[Appendix A, “PeopleSoft Contributor Relations Reports,” AVPCAE, GIFTINC, GIFTINCII, GIFTINCIV – CAE Gift Income Report, page 580](#)

Analyzing Giving History

You can track information about a donor’s giving patterns and giving history. The system uses information you enter when you create gift and pledge transactions, then summarizes it on a series of pages.

This section discusses how to:

- View a donor's giving profile.
- View an organization's giving profile.
- View a donor's commitment summary.
- View commitment summary details.
- Search for donor commitment registers.
- View donor commitment registers.
- Search for donor transaction registers.
- View donor transaction registers.
- Compare profiles in a workset.
- View designation information.

Common Elements Used in This Section

Session Type

Select a session type from the prompt box. Valid session types include *Gift*, *Pledge*, *Member*, *Gift Adjustment*, *Pledge Adjustment*, and *Member Adjustment*. If you do not select a session type, the Commitment Register or Transaction Register page displays gift, pledge, and membership sessions. Adjustment sessions only appear if the View Adjustments check box is selected or if specifically selected in this field. Session types are delivered with your system as translate values. Do not modify these translate values in any way. Any modifications to these values will require a substantial programming effort.

Self Service Session

Enables users to filter for commitment or transaction registers created as a result of an Involvement self-service session.

Credit Type

Select the credit type for which to view information. Credit type refers to the type of credit the donor received for the commitment, such as *Hard Credit*, *Soft Credit*, and *Vehicle Credit*. Credit types, other than hard, are defined by your institution.

Match

If you only want to view transactions that equal a specific amount, enter that amount.

Pages Used to Analyze Giving History

Page Name	Object Name	Navigation	Usage
Giving Profile	AV_P_GPROFILE, AV_P_GPROFILE_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Inquire, Giving Profile • Manage Contributor Relations, Enter Commitments, Workset, Giving Profile • Manage Contributor Relations, Analyze Giving History, Inquire, Giving Profile • Manage Contributor Relations, Analyze Giving History, Workset, Giving Profile • Manage Contributor Relations, Manage Prospects, Inquire, Giving Profile 	View a summary of a donor's giving history.
Giving Profile Org - Giving Profile (giving profile organization – giving profile)	AV_P_GPROFILE_E	<ul style="list-style-type: none"> • Manage Contributor Relations, Analyze Giving History, Inquire, Giving Profile - Org, Giving Profile • Manage Contributor Relations, Enter Commitments, Inquire, Giving Profile - Org, Giving Profile • Manage Contributor Relations, Manage Organizations, Inquire, Giving Profile - Org, Giving Profile 	View a summary of an organization's giving history.

Page Name	Object Name	Navigation	Usage
Commitment Summary	AV_CMTMT_SMRY, AV_CMTMT_SMRY_E, AV_CMTMT_SMRY_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Inquire, Commitment Summary • Manage Contributor Relations, Enter Commitments, Inquire, Commitment Summary-Org • Manage Contributor Relations, Enter Commitments, Workset, Commitment Summary • Manage Contributor Relations, Analyze Giving History, Inquire, Commitment Summary • Manage Contributor Relations, Analyze Giving History, Inquire, Commitment Summary-Org • Manage Contributor Relations, Analyze Giving History, Workset, Commitment Summary 	View information about a donor's total commitments and summaries of a donor's giving history by fiscal year.
Commitment Summary Details	AV_CMTMT_SMRY_SP	Click the Details link on the Commitment Summary page.	View information about a commitment.
Account Details	AV_ACCT_DTL_SP	Click the Designation Name link on the Commitment Summary Details page.	View information about the designation and account for a specific commitment.
Transaction Register	AV_TRANS_LIST_SP	Click the Details link on the Commitment Summary Details page.	View information about how a transaction is allocated to a designation.
Commitment Register Filter	AV_CMTMT_TRNS_FLTR	<ul style="list-style-type: none"> • Manage Contributor Relations, Analyze Giving History, Inquire, Commitment Register, Commitment Register Filter • Manage Contributor Relations, Enter Commitments, Inquire, Commitment Register, Commitment Register Filter 	Choose criteria used to narrow the number of transactions you view on the Commitment Register page.

Page Name	Object Name	Navigation	Usage
Commitment Register	AV_CMTMT_TRNS_LIST	<ul style="list-style-type: none"> • Manage Contributor Relations, Analyze Giving History, Inquire, Commitment Register, Commitment Register • Manage Contributor Relations, Enter Commitments, Inquire, Commitment Register, Commitment Register 	View the transactions that match the criteria you set on the Commitment Register Filter page.
Transaction Filter	AV_TRANS_FLTR, AV_TRANS_FLTR_E, AV_TRANS_FLTR_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Commitment Entry, Inquire, Transaction Register, Transaction Filter • Manage Contributor Relations, Commitment Entry, Inquire, Transaction Register-Org, Transaction Filter • Manage Contributor Relations, Commitment Entry, Workset, Transaction Register, Transaction Filter • Manage Contributor Relations, Analyze Giving History, Inquire, Transaction Register, Transaction Filter • Manage Contributor Relations, Analyze Giving History, Inquire, Transaction Register-Org, Transaction Filter • Manage Contributor Relations, Analyze Giving History, Workset, Transaction Register, Transaction Filter 	Select criteria used to narrow the number of transactions you view on the Transaction Register page.

Page Name	Object Name	Navigation	Usage
Transaction Register	AV_TRANS_LIST, AV_TRANS_LIST_E, AV_TRANS_LIST_W	<ul style="list-style-type: none"> • Manage Contributor Relations, Enter Commitments, Inquire, Transaction Register, Transaction Register • Manage Contributor Relations, Enter Commitments, Inquire, Transaction Register-Org, Transaction Register • Manage Contributor Relations, Enter Commitments, Workset, Transaction Register, Transaction Register • Manage Contributor Relations, Analyze Giving History, Inquire, Transaction Register, Transaction Register • Manage Contributor Relations, Analyze Giving History, Inquire, Transaction Register-Org, Transaction Register • Manage Contributor Relations, Analyze Giving History, Workset, Transaction Register, Transaction Register 	View the transactions that meet the criteria you selected on the Transaction Filter page.
Profile Compare	AV_GP_WSET_CMPR	<ul style="list-style-type: none"> • Manage Contributor Relations, Analyze Giving History, Workset, Profile Compare, Profile Compare • Manage Contributor Relations, Enter Commitments, Workset, Profile Compare, Profile Compare 	Compare the information contained in giving profiles for the constituents in a workset.
Profile Compare Columns	AV_PROF_CMP_DEF_SP	Click the Profile Compare Columns button on the Profile Compare page.	Change the columns of information to view on the Profile Compare page.
Designation Funds Detail	AV_DESIGNATION_DTL	Manage Contributor Relations, Enter Commitments, Inquire2, Designation Funds Detail, Designation Funds Detail	View information about the valid designations used by your institution.
Designation Detail	AV_DES_DTL_PNL2	Click the Details link on the Designation Funds Detail page.	View additional information about a designation.

Viewing a Donor's Giving Profile




Access the Giving Profile page.

Important! You must run the Accumulate Constituent Totals process when processing sessions or after updating matching gift information to ensure that the totals on this page are accurate.

Giving Profile

Gallegher,Shawn
Constituent Type: Alumni

ID: AV0001
Yr: 2001




Institution: PSUNV

Lifetime Information		Historical Information	
Lifetime Commitments	50.00 USD	Total YTD Giving	50.00
Lifetime Open Pledges	0.00	Total Prior Year Giving	0.00
Largest Pledge	0.00	Last Gift Date	03/23/2001
Lifetime Gifts/Payment	50.00	Last Gift Amount:	50.00
Largest Gift	50.00	First Gift Year:	2001
Lifetime Hard Credits	50.00	Total Years Giving:	1
		Consecutive Years Giving:	1

Additional Information		Matching Gift Information	
<input type="checkbox"/> Split Recognition		Lifetime Match:	0.00
<input type="checkbox"/> Anonymous		Matched Gifts:	0.00
<input checked="" type="checkbox"/> Foundation		Open Matches:	0.00
<input checked="" type="checkbox"/> Planned Giving Donor		Last Match:	0.00

[Giving Club Progress](#)
☐ View Details by Designation

Giving Profile page

Lifetime Information

Lifetime Commitments Displays the total amount of money ever donated or pledged by the donor.

Click to view the date, gift type, credit type, and amount for each commitment made on the Lifetime Commitments page.

Lifetime Open Pledges Displays the total amount of money promised but not yet donated by the donor.

Click to view the date, gift type, credit type, and amount for each outstanding pledge on the Lifetime Open Pledges page.

Largest Pledge Displays the amount of the largest pledge commitment the donor has made.

Click to view detailed information about the pledge on the Largest Pledge page, and to access the Designation Detail and Recognition Detail pages.

Lifetime Gifts/Payment	<p>Displays the total amount of money ever donated by the donor. This amount only includes money actually received, and excludes outstanding pledges.</p> <p>Click to view the date, gift type, credit type, and amount for each gift given on the Lifetime Gifts and Pledge Payments page.</p>
Largest Gift	<p>Displays the amount of the largest gift given by the donor.</p> <p>Click to view detailed information about the largest gift on the Largest Gift page, and to access the Designation Detail, Matching Gifts, and Recognition Detail pages.</p>
Lifetime Hard Credits	<p>Displays the total amount of hard credit given to the donor for recognition purposes.</p> <p>Click to view the date, gift type, credit type, and amount for each transaction for which the donor received hard recognition credit on the Lifetime Hard Credits page.</p>
Historical Information	
Total YTD Giving	<p>Displays the total amount of money donated by the constituent during the current fiscal year.</p> <p>Click to view the date, gift type, credit type, and amount for each gift given during the current fiscal year on the Total Year to Date Giving page.</p>
Total Prior Year Giving	<p>Displays the total amount of money donated by the constituent during the previous fiscal year.</p> <p>Click to view the date, gift type, credit type, and amount for each gift given during the prior fiscal year on the Total Prior Year Giving page.</p>
Last Gift Date	<p>Displays the date on which the donor's most recent gift was posted in the system. Only hard credit recognition is used to calculate this field.</p> <p>Click to view detailed information about the largest gift on the Last Gift Date page, and to access the Designation Detail and Recognition Detail pages.</p>
Last Gift Amount	Displays the amount of the donor's most recent gift.
First Gift Year	Displays the year in which the donor first gave to your institution. Only hard credit recognition is used to calculate this field.
Total Years Giving	Displays the total number of years in which the donor has given to your institution.
Consecutive Years Giving	Displays the total number of consecutive years in which the donor has given to your institution. The value in this field resets to zero if more than one year has passed since the donor's most recent gift. Only hard credit recognition is used to calculate this field.

Additional Information

Split Recognition	If selected, indicates that recognition has been split between this donor and another donor for the same gift.
Anonymous	If selected, indicates that the Anonymous check box is selected on the Gift Entry page for a gift from this donor.
Foundation	If selected, indicates that the donor has a relationship established in the system with a foundation. Foundations must have a constituent type of <i>Corporate Foundation</i> , <i>Foundation</i> , or <i>Personal, Family/Foundation</i> .

Matching Gift Information

Lifetime Match	Displays the total amount of money ever received as a matching gift and currently expected as a match from a qualifying organization as a result of the donor's gifts.
Matched Gifts	If you are viewing a giving profile for a donor that is a person, displays the amount that has been received as a matching gift from a qualifying organization as a result of the donor's gifts.
Open Matches	Displays the total amount of matching gifts expected from an organization as a result of the donor's gifts.
Last Match	If you are viewing a giving profile for a donor that is a person, displays the amount of the last matching gift received from a qualifying organization as a result of the donor's gift.

Other Page Elements

View Details By Designation	Select this check box if you want to view commitments to each designation separately on the dialog boxes you access from this page. If you want each transaction to display as one record, regardless of the designations it is allocated to, clear this check box.
Giving Club Progress	Click to view information about a donor's progression through giving clubs and various club levels at your institution. The Giving Club Progress page appears.

See Also

[Chapter 23, "Processing Commitments and Analyzing Giving History," Tracking Giving Club Progress, page 481](#)

Viewing an Organization's Giving Profile

Access the Giving Profile page.

Giving Profile

Accum Org

ID: AV90000





Constituent Type: Corporate Foundation

Institution: PSUNV

Lifetime Information

Lifetime Commitments	23,650.00 USD
Lifetime Open Pledges	8,000.00
Largest Pledge	10,000.00
Lifetime Gifts/Payment	15,650.00
Largest Gift	15,000.00
Lifetime Hard Credits	15,500.00

Historical Information

Total YTD Giving	150.00
Total Prior Year Giving	0.00
Last Gift Date	12/31/1998
Last Gift Amount:	15,000.00
First Gift Year:	1998
Total Years Giving:	1
Consecutive Years Giving:	0

Additional Information

☒ Split Recognition
 ☐ Anonymous
 ☐ Foundation

Matching Gift Information

Lifetime Match:	0.00
Open Matches:	0.00
YTD Match:	0.00
Prev Yr Match:	0.00

[Giving Club Progress](#)
☐ View Details by Designation

Giving Profile Org - Giving Profile page

Important! You must run the Accumulate Constituent Totals process when processing sessions or after updating matching gift information to ensure that the totals on this page are accurate.

Lifetime Information

Lifetime Commitments

Displays the total amount of money ever donated or pledged by the organization.

Click to view the date, gift type, credit type, and amount for each commitment made on the Lifetime Commitments page.

Lifetime Open Pledges

Displays the total amount of money promised but not yet donated by the organization.

Click to view the date, gift type, credit type, and amount for each outstanding pledge on the Lifetime Open Pledges page.

Largest Pledge

Displays the amount of the largest pledge commitment the organization has made.

Click to view detailed information about the pledge on the Largest Pledge page, and to access the Designation Detail and Recognition Detail pages.

Lifetime Gifts/Payment	<p>Displays the total amount of money ever donated by the organization. This amount only includes money actually received, and excludes outstanding pledges.</p> <p>Click to view the date, gift type, credit type, and amount for each gift given on the Lifetime Gifts and Pledge Payments page.</p>
Largest Gift	<p>Displays the amount of the largest gift given by the organization.</p> <p>Click to view detailed information about the largest gift on the Largest Gift page, and to access the Designation Detail, Matching Gifts, and Recognition Detail pages.</p>
Lifetime Hard Credits	<p>Displays the total amount of hard credit given to the organization for recognition purposes.</p> <p>Click to view the date, gift type, credit type, and amount for each transaction for which the donor received hard recognition credit on the Lifetime Hard Credits page.</p>
Historical Information	
Total YTD Giving	<p>Displays the total amount of money donated by the organization during the current fiscal year.</p> <p>Click to view the date, gift type, credit type, and amount for each gift given during the current fiscal year on the Total Year to Date Giving page.</p>
Total Prior Year Giving	<p>Displays the total amount of money donated by the organization during the previous fiscal year.</p> <p>Click to view the date, gift type, credit type, and amount for each gift given during the prior fiscal year on the Total Prior Year Giving page.</p>
Last Gift Date	<p>Displays the date on which the organization's most recent gift was posted in the system. Only hard credit recognition is used to calculate this field.</p> <p>Click to view detailed information about the largest gift on the Last Gift Date page, and to access the Designation Detail and Recognition Detail pages.</p>
Last Gift Amount	Displays the amount of the organization's most recent gift.
First Gift Year	<p>Displays the year in which the organization first gave to your institution. Only hard credit recognition is used to calculate this field.</p>
Total Years Giving	Displays the total number of years in which the organization has given to your institution. Only hard credit recognition is used to calculate this field.
Consecutive Years Giving	Displays the total number of consecutive years in which the organization has given to your institution. The value in this field resets to zero if more than one year has passed since the organization's most recent gift. Only hard credit recognition is used to calculate this field.

Additional Information

Split Recognition	If selected, indicates that recognition has been split between this organization and another constituent for the same gift.
Anonymous	If selected, indicates that the Anonymous check box is selected on the Gift Entry page for a gift from this organization.
Foundation	If selected, indicates that the organization has a relationship established in the system with a foundation. Foundations must have a constituent type of <i>Corporate Foundation</i> , <i>Foundation</i> , or <i>Personal, Family/Foundation</i> .

Matching Gift Information

Lifetime Match	Displays the total amount of money ever received as matching gifts and currently expected as a match as a result of gifts from donors connected to the organization.
Open Matches	Displays the total amount of matching gifts expected from an organization as a result of gifts from donors connected to the organization.
YTD Match (year to date match)	Displays the total amount of matching gifts received from the beginning of the current year to date.
Prev Yr Match (previous year match)	Displays the total amount of the matching gifts in the previous year.

Other Page Elements

View Details By Designation	Select this check box to view commitments to each designation separately on the dialog boxes you access from this page. If you want each transaction to display as one record, regardless of the designations it is allocated to, clear this check box.
Giving Club Progress	Click to view information about a donor's progression through giving clubs and various club levels at your institution on the Giving Club Progress page.

See Also

[Chapter 23, "Processing Commitments and Analyzing Giving History," Tracking Giving Club Progress, page 481](#)

Viewing a Donor's Commitment Summary

Access the Commitment Summary page.

Commitment Summary

Gallegher, Shawn

Constituent Type:

Alumni

ID: AV0001

Yr: 2001

Institution: PSUNV

Lifetime Commitments

50.00 USD

Lifetime Giving

50.00

Total Years Giving

1

Consecutive Years Giving

1

View All

First

1 of 1

Last

Fiscal Year	Total Commitments	Total Giving	Pledge Balance	Recognition Credits	Recognition Pledge Balance	Details
2001	50.00	50.00	0.00	0.00	0.00	Details

Commitment Summary page

Important! You must run the Accumulate Constituent Totals process when processing sessions or after updating matching gift information to ensure that the totals on this page are accurate.

Lifetime Commitments	Displays the total amount of money ever donated or pledged by the donor.
Lifetime Giving	Displays the total amount of money ever donated by the constituent. This amount only includes money actually received, and excludes outstanding pledges.
Total Years Giving	Displays the total number of years in which the donor has given to your institution. Only hard credit recognition is used to calculate this field.
Details	Click to view more detailed information about the commitments a donor made throughout a particular fiscal year on the Commitment Summary Details page.

Viewing Commitment Summary Details

Access the Commitment Summary Details page, where giving information is totaled by designation.

Commitment Summary Details

Fiscal Year: 2001

Year Total Commitments: 50.00 USD

View All

First 1 of 1 Last

Designation Business Unit	Designation Name	Total Giving	Pledge Balance	Recognition Credits	Recognition Pledge Balance	Details
MEDBU	Medical School Building Fund	50.00	0.00	0.00	0.00	Details

Commitment Summary Details page

Designation Name	Indicates the allocation account to which the donor made a gift or pledge. Click to open the Account Details page. This page displays the details about the Designation Fund, including Account Name, Account Type, and Item Type.
Total Giving	Displays the total amount in gifts and pledge payments the donor made to this designation during this fiscal year.
Pledge Balance	Displays the total amount in outstanding pledges the donor carries to this designation during this fiscal year.
Recognition Credits	Displays the total amount the donor received in Recognition Credit to this designation during this fiscal year.

Recognition Pledge Balance Displays the total amount the donor is due to receive in recognition credit from outstanding pledge balances to this designation during this fiscal year.

Details Click to access the Transaction Register page, where you can view additional information about the commitment.

Filtering Donor Commitment Registers

Access the Commitment Register page to select the transactions for a donor without regard to split designations.

Note. Each gift appears as a single line item on the Commitment Register page, regardless of the designations to which it is allocated.

Commitment Register Filter Commitment Register

Szymborski, William ID: DM0040

Constituent Type: [Alumni](#) Year: None Institution: PSUNV

Business Unit: PSUNV main BU

Session Type: Self Service Session ☐

Credit Type View All First 1 of 1 Last

Date Range

From:

To:

Amount Range

From: USD Match: ☐

To:

☐ View Adjustments ☐ Group Related Transactions

Commitment Register Filter page

Once you use the criteria on this page to narrow the number of transactions you want to view, you can then review a summary of each transaction matching your selection criteria on the Commitment Register page.

Business Unit Enter the business unit for which to view a commitment register.

View Adjustments Select this check box to include adjusted transactions on the Commitment Register page.

Group Related Transactions Select this check box to view transactions and their related adjustments, and pledges and their related pledge payments together on the Commitment Register page.

Viewing Donor Commitment Registers







Access the Commitment Register page.

Commitment Register Filter

Commitment Register

Szymborski,William

ID: DM0040

Constituent Type: [Alumni](#)

Year: None

Institution: PSUNV

View All

First ◀ 1-7 of 7 ▶ Last

Business Unit	Date	Trans Type	Credit Type	Amount	Details
1 PSUNV	01/13/2001	Gift	Hard Credit	250.00 USD	Details
2 PSUNV	01/28/2000	Gift	Hard Credit	250.00 USD	Details
3 PSUNV	01/18/1999	Gift	Hard Credit	200.00 USD	Details
4 PSUNV	03/01/1998	Gift	Hard Credit	200.00 USD	Details
5 PSUNV	02/22/1997	Gift	Hard Credit	150.00 USD	Details
6 PSUNV	01/21/1996	Gift	Hard Credit	100.00 USD	Details
7 PSUNV	02/14/1994	Gift	Hard Credit	50.00 USD	Details

Commitment Register page

Details

Click to open the Gift Detail or Pledge Detail page, depending on the type of transaction you are viewing.

Filtering Donor Transaction Registers

Access the Transaction Filter page to select transactions for a donor.

Note. If one commitment is allocated to multiple designations, each designation appears as a separate line item on the Transaction Register page.

Transaction Filter page

You can limit the number of transactions you choose to view, then view summaries of each transaction matching your selection criteria on the Transaction Register page.

Designation BU (designation business unit)

Enter the designation business unit for which to view transactions. Designation business units are assigned when you allocate transactions to designations at your institution.

Designation

Enter a designation code from the prompt box containing a list of designations for the selected business unit. When you select a designation, its description displays to the right of this field.

If a donor made a commitment to a designation that is now inactive, the designation still displays as a value in the prompt box.

Campaign

Select a campaign from the prompt box containing all the valid campaign initiatives at your institution. A campaign is an organized institutional effort targeted to a specific constituency that occurs over a specified period of time with specific purposes and goals.

View Adjustments

Select this check box to include adjusted transactions on the Transaction Register page.

Group Related Transactions

Select this check box to view transactions and their related adjustments, and pledges and their related pledge payments together on the Transaction Register page.

Viewing Donor Transaction Registers

Access the Transaction Register page.

Transaction Filter
Transaction Register

Whitley, Christopher
ID: AV0007

Constituent Type: Alumni
Yr: 1942
Institution: PSUNV

View All
First
1-2 of 2
Last

Des BU	Date	Designation Name	Campaign	Transaction Type	Credit Type	Amount	Details
1 MEDBU	07/24/2001	Medical School Building Fund	Medical Building Campaign	Gift	Hard Credit	3,000.00 USD	Details
2 MEDBU	07/20/2001	Medical School Building Fund	Medical Building Campaign	Pledge	Hard Credit	4,000.00 USD	Details

Transaction Register page

Des BU (designation business unit)

Displays the name of the designation business unit to which the commitment was allocated.

Details

Click to open the Gift Detail or Pledge Detail page, depending on the type of transaction you are viewing.

Comparing Profiles In a Workset

Access the Profile Compare page.

Note. This page can only be accessed through the Workset menu. Column order for grids may vary by implementation. Not all columns may appear.

Profile Compare

Workset Code: BOTH People/Orgs
Institution: PSUNV

From Date:
To Date:
Refresh
Profile Compare Columns

Giving Detail 1
Giving Detail 2

ID	Constituent	LTime Commitments	LTime Gifts/Payments	LTime Open Pledges	LTime Hard Credits	Total YTD Giving
1 AV1000	Ford Motor Company	0.00	0.00	0.00	0.00	0.00
2 AV1010	Bechtel Power Company	0.00	0.00	0.00	0.00	0.00
3 AV1050	Ford Foundation	0.00	0.00	0.00	0.00	0.00
4 AV2000	Lambert Manufacturing	0.00	0.00	0.00	0.00	0.00
5 AV0001	Gallegher, Shawn	50.00	50.00	0.00	50.00	50.00
6 AV0010	Kuney, Dara	0.00	0.00	0.00	0.00	0.00
7 AV0020	Johnson, Shaqua	0.00	0.00	0.00	0.00	0.00
8 AV0021	Randle, Sally	0.00	0.00	0.00	0.00	0.00

Profile Compare page

Profile Compare Columns

Click to change the columns you view on this page in this instance. The Select Profile Compare Columns page displays.

Select the check box next to each field to display as a column on the Profile Compare page, then click the OK button. The Profile Compare page reappears with the column settings you selected.

Note. These fields are defined on the Giving Profile page.



Click to combine the Giving Detail 1 and Giving Detail 2 tabs into a single grid for viewing.

See Also

Chapter 2, “Setting Up Your PeopleSoft Contributor Relations Framework,” Defining User Defaults, page 7

Viewing Information About Designations

Access the Designation Funds Detail page.

Designation Funds Detail						
SetID: LAWBU						
				View All	First ◀ 1 of 1 ▶ Last	
Designation	Designation Name	Case Type	Designation Type	Matching Gift	Status	Details
1 FREVENT	Development Fund Raising Event	Endowment & Similar	Law	None	Active	Details

Designation Funds Detail page

Details

Click to view more detailed information about the designation and the account it is associated with. The Designation Detail page appears.

See Also

Chapter 12, “Setting Up Commitment Management,” Defining Designation Funds, page 119

Generating Designation Donor Reports

This section discusses how to generate reports that list donors to a specific designation.

Page Used to Generate Designation Donor Reports

Page Name	Object Name	Navigation	Usage
Designation Donor List	AV_RUNCTL_DESDN	<ul style="list-style-type: none"> Manage Contributor Relations, Analyze Giving History, Report, Designation Donor List, Designation Donor List Manage Contributor Relations, Enter Commitments, Report, Designation Donor List, Designation Donor List 	Enter parameters and generate the Designation Donor List report. This report contains information about the posted commitments made to a particular designation.

Running a Designation Donor List Report

Access the Designation Donor List page.

Designation Donor List

Run Control ID: PS [Report Manager](#) [Process Monitor](#) [Run](#)

*Business Unit: MEDBU Medical Business Unit

*Designation: ANNUALFUND Annual Fund

From: To:

Constituents View All First 1 of 1 Last

Credit Type View All First 1 of 1 Last

Designation Donor List page

Business Unit

Enter the designation business unit for which to generate a report. The report contains information about commitments to the business unit and designation you select.

Designation

Select the designation for which to view commitments. Designations are funds at your institution to which donations and pledges can be allocated. The report contains information about commitments made to the designation you select. The values in the prompt include those designations for the setID related to the business unit selected.

Both active and inactive designations display in the prompt for this field.

From and To

Note. If you do not select a date range, the system does not eliminate any records from the designation donor list report based on date range.

Constituents

Select the type of constituents whose commitments you want to view on the report. The values that display in this field are the valid constituent types defined at your institution. Examples of constituents are *Alumni*, *Friend*, *Corporation*, and so on.

If you do not select constituent types, the system does not eliminate any records from the designation donor list report based on constituent type.

Important! When you run the report, the row for each donor displays the highest priority constituent type assigned to the donor at the time a commitment was made to the designation. This type may vary from the type you select on this page, but the donor possessed the one you selected at the time the commitment was made.

Keep in mind, an organization can only be assigned one constituent type at any given time.

See [Chapter 4, “Setting Up Constituent Data,” Defining Constituent Types, page 42](#).

Credit Type

Select the credit types to view commitment information on the report. Credit type refers to the type of recognition the donor received for the commitment, such as *Hard Credit*, *Soft Credit*, and so on. Credit types are defined by your institution using the Recognition Types page.

If you do not select credit types, the system does not eliminate any records from the designation donor list report based on credit type.

The Designation Donor report lists all the commitments made to a particular designation that match the parameters you defined on this page.

Example

In the following example, Shawn Gallegher makes two commitments to the Annual Fund. The first commitment is made when he’s a student in October, 1995, and the second is made when he’s an alumnus in October, 1998.

Gift Amount	Gift Date	Constituent Type	Credit Type
USD 1,000.00	10/01/95	Student	Soft Credit
USD 2,000.00	10/01/98	Alumnus	Hard Credit

If you set the following report parameters:

- Date Range: 01/01/95 – 01/01/96

- Constituents: Student, Alumni
- Credit Type: None selected

Your report would include a USD 1,000.00 gift from Shawn Gallagher with a Constituent Type of *Student*. The date range excludes his commitment on 10/01/98.

If you set the following parameters:

- Date Range: 01/01/95 – 01/01/00
- Constituents: Student
- Credit Type: None selected

Your report would include a USD 1,000.00 gift from Shawn Gallagher with a Constituent Type of *Student*. The Constituent Type excludes his commitment on 10/01/98 because he was an alumnus when he made the commitment.

If you set the following report parameters:

- Date Range: 01/01/95 – 01/01/00
- Constituents: Student, Alumni
- Credit Type: Hard

Your report would include a USD 2,000.00 gift from Shawn Gallagher with a Constituent Type of *Alumni*. The Credit Type excludes his commitment on 10/01/95 because he received soft credit for the commitment.

If you set the following report parameters:

- Date Range: 01/01/95 – 01/01/00
- Constituents: Student, Alumni
- Credit Type: None selected

Your report would include a USD 3,000.00 gift from Shawn Gallagher with a Constituent Type of *Alumni*. Both commitments are included within these parameters, and *Alumni* is the constituent type returned for Shawn Gallagher because it has the highest priority of the commitments selected.

See Also

Appendix A, “PeopleSoft Contributor Relations Reports,” PeopleSoft Contributor Relations Reports: Selected Reports, page 575

CHAPTER 24

Interfacing with PeopleSoft Financials 8.4

This chapter provides overviews of GL interface publish-and-subscribe functionality and PeopleSoft Financials 8.4 interface messaging, and also discusses how to:

- Set up your PeopleSoft Contributor Relations system to integrate with your PeopleSoft Financials 8.4 system.
- Publish accounting line information automatically.
- Publish accounting line information manually.
- Monitor messaging.
- View accounting line information.
- Troubleshoot the interface.

Understanding the Interface

If your institution uses a financial system other than PeopleSoft Financials 8.4 to run GL interface, the system creates a flat file, which your institution's financial system can access. However, if your institution uses PeopleSoft Financials 8.4, PeopleSoft Contributor Relations can use publish and subscribe functionality (messaging back and forth) between its database and PeopleSoft Financials so that the two systems can share accounting line information. The publish and subscribe functionality is asynchronous, meaning that the systems do not process GL transactions in realtime.

Publish and subscribe functionality helps your institution's ability to track financial information in both PeopleSoft Contributor Relations and PeopleSoft Financials, since the messages sent from PeopleSoft Financials to PeopleSoft Contributor Relations after the journals have been created include specific journal information such as the Journal ID, Date, and Line Number. This assists in the audit trail of transactions passed between the databases.

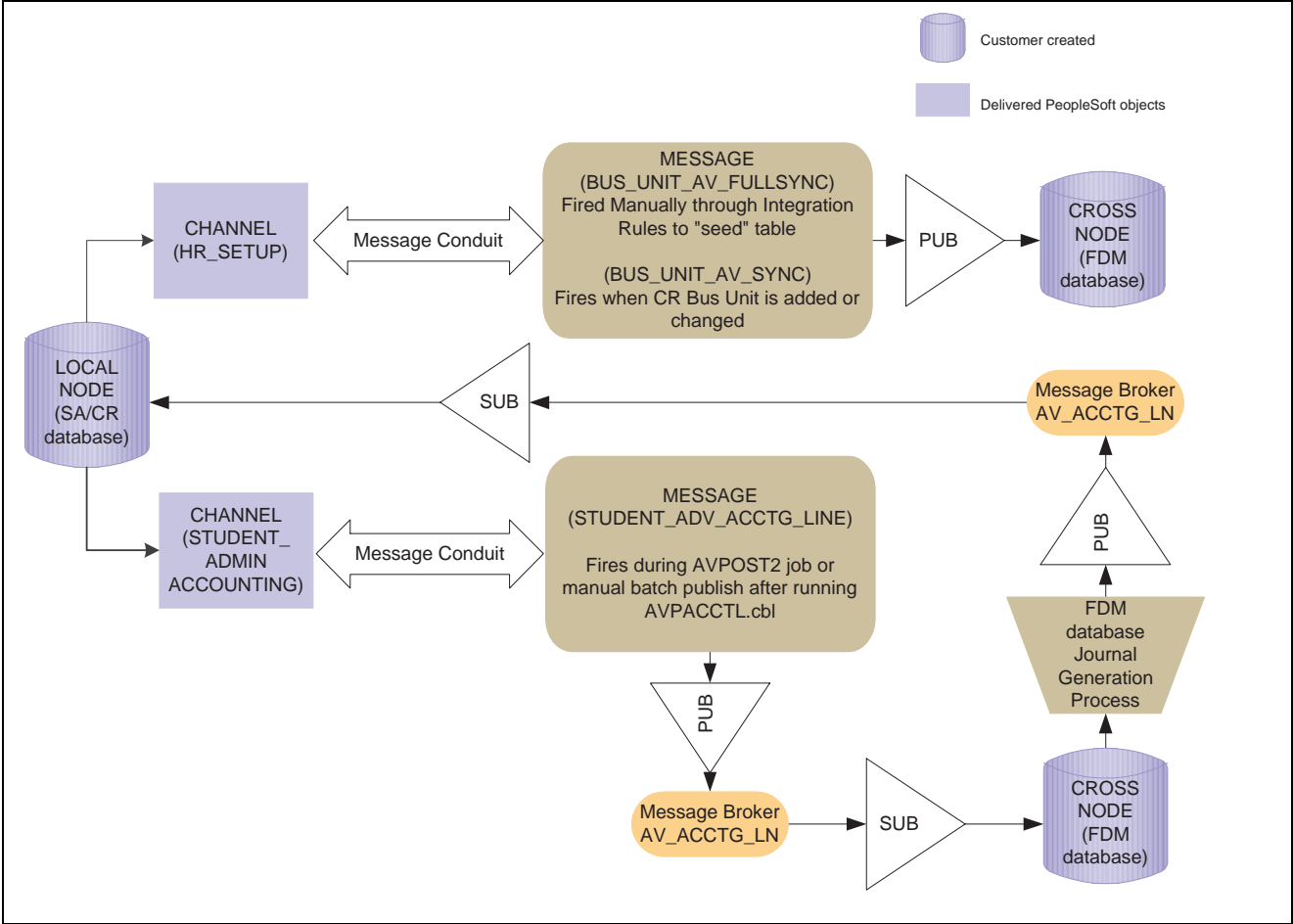
See Also

Chapter 23, "Processing Commitments and Analyzing Giving History," Processing and Posting Sessions, page 427

PeopleSoft 8.4 General Ledger PeopleBook, "Integrating and Transferring Information Among Applications," Integrating PeopleSoft General Ledger with PeopleSoft Human Resource Management Solutions (HRMS 8.0 and 8.3) and Learning Solutions (LS 8.0)

Understanding Messaging

The diagram below illustrates how messages travel between PeopleSoft Contributor Relations 8 and PeopleSoft Financials 8.4.



PeopleSoft Contributor Relations 8 to PeopleSoft Financials 8.4 messaging process

PeopleSoft Contributor Relations delivers two message channels and three messages to the PeopleSoft Financials database:

Message Channel	Message	Description
STUDENT_ADMIN_ACCOUNTING	STUDENT_ADV_ACCTG_LINE	Notifies the message broker that new AV_ACCTG_LN records are ready to be retrieved by PeopleSoft Financials and, after journal generation, retrieves the updated AV_ACCTG_LN records into PeopleSoft Contributor Relations.

Message Channel	Message	Description
HR_SETUP	BUS_UNIT_AV_FULLSYNC	Sends the BUS_UNIT, DESCR, and DESCRSHORT rows in the AV_BUS_UNIT_TBL to PeopleSoft Financials to seed its AV_BUS_UNIT_TBL.
	BUS_UNIT_AV_SYNC	Sends new PeopleSoft Contributor Relations business units or updates when the DESCR or DESCRSHORT fields are changed.

PeopleSoft delivers a default node of PSFT_LS. If you change this default, you must reconfigure the message channel. However, regardless of whether or not you change the message node, you must configure it by inserting the proper URL.

Note. An easy way to determine where messaging starts and ends is to name the publishing node with the name of the database to which it publishes or from which it publishes.

On the PeopleSoft Financials side, message definition and message channel naming must match the naming used on the PeopleSoft Contributor Relations side.

Setting Up Integration with PeopleSoft Financials 8.4

This section discusses how to:

- Note the version of your institution's financial software.
- Define batch publish rules.
- Define batch programs.
- Set up business unit synchronization.
- Synchronize PeopleSoft Contributor Relations business unit data with PeopleSoft Financials.

Pages Used to Set Up Integration

Page Name	Object Name	Navigation	Usage
CR Installation (Contributor Relations installation)	AV_INSTALLATION	Design Student Administration, Define Contributor Relations, Setup, Contributor Relations, CR Installation	Identify the version of financial software in use at your institution, whether from PeopleSoft or a third-party vendor.
Batch Publish Rules	EO_MSGPUBATCH	Define Business Rules, Manage Integration Rules, Use, Batch Publish Rules	Define rules required for background publishing, whether publishing manually or by running the EOP_PUBLISHA process that is part of the AVPOST2 job.
Batch Programs	EO_MSGBATPGM	Define Business Rules, Manage Integration Rules, Use, Batch Publish Rules, Batch Programs	Define the process that the manual or automatic process will access (AVPACCTL).
Full Table Publish Rules	EO_MSGPUBFULL	Define Business Rules, Manage Integration Rules, Use, Full Table Publish Rules	Define publish rules that enable messaging.
Full Data Publish	EO_FULLDATAPUB	Define Business Rules, Manage Integration Rules, Process, Full Data Publish	Define full data publish run control for the BUS_UNIT_AV_FULLSYNC message.

Identifying Financials Software Version

Your Financials Release selection on the CR Installation page determines which “path” the PeopleSoft Contributor Relations system will use to transfer accounting line information. The values *7.5* and *Other* trigger a flat-file approach, in which the system creates a flat file that can be picked up and used both by older versions of PeopleSoft Financials and by an external financial application. The value *8.4* triggers an integrated messaging interface.

See Also

[Chapter 2, “Setting Up Your PeopleSoft Contributor Relations Framework,” Completing CR Installation, page 3](#)

Defining Batch Publish Rules

Access the Batch Publish Rules page and select the *STUDENT_ADV_ACCTG_LINE* message to enter the component. The Batch Publish Rules component (the Batch Publish Rules and Batch Programs pages) enables you to activate *STUDENT_ADV_ACCTG_LINE* messaging.

Batch Publish Rules Record Mapping Batch Programs

Message Name: STUDENT_ADV_ACCTG_LINE

Description: AV_ACCTG_LN Message

Publish Rule Definition View All First 1 of 1 Last

*Publish Rule ID:	STUDENT_ADV_ACCTG_LINE	+ -
*Description:	AV_ACCTG_LN Message Batch Rule	
*Status:	Active	
Chunking Rule ID:		🔍
Alternate Chunk		
Table:		

Message Options

- ☒ Create Message Header
- ☒ Create Message Trailer

Output Format

- ☒ Message
- ☐ Flat File
- ☐ Flat File with Control Record

Batch Publish Rules page

Publish Rule ID Enter *STUDENT_ADV_ACCTG_LINE*.

Status You must set this to *Active*.

Message Options You must select the check boxes next to Create Message Header and Create Message Trailer.

Defining Batch Programs

Access the Batch Programs page.

Batch Publish Rules Record Mapping **Batch Programs**

Message Name: STUDENT_ADV_ACCTG_LINE

Description: AV_ACCTG_LN Message

Publish Rule Definition View All First 1 of 1 Last

*Publish Rule ID: STUDENT_ADV_ACCTG_LINE + -

*Description: AV_ACCTG_LN Message Batch Rule

Batch Programs View All First 1 of 1 Last

Process Name:	Description:	+ -
AVPACCTL	G/L Interface	

Batch Programs page

Enter the Process Name *AVPACCTL*, which EOP_PUBLISH or EOP_PUBLISHM will pick up when publishing accounting lines to the PeopleSoft Financials system. If you do not select this process, the messages will not be created when EOP_PUBLISH or EOP_PUBLISHM runs.

Setting Up Business Unit Synchronization

Access the Full Table Publish Rules page and select the *BUS_UNIT_AV_FULLSYNC* message to enter the component. The Full Table Publish Rules Component (the Full Table Publish Rules and Full Table Publish pages) enables you to synchronize or “seed” PeopleSoft Contributor Relations business unit information between PeopleSoft Contributor Relations and PeopleSoft Financials.

Note. You must synchronize all PeopleSoft Contributor Relations business units before you run any GL processes, by running *BUS_UNIT_AV_FULLSYNC* full table publish once. Thereafter, the system manages additions or changes through messaging in the Business Unit CR component.

Full Table Publish Rules | Record Mapping | Languages

Message Name: BUS_UNIT_AV_FULLSYNC

Description: Contributor Rel BU Fullsync

Publish Rule Definition View All First 1 of 1 Last

*Publish Rule ID:	BUS_UNIT_AV_FULLSYNC	+ -
*Description:	BUS_UNIT_AV_FULLSYNC Pub Rule	
*Status:	Active	
Chunking Rule ID:		
Alternate Chunk		

Table:

Message Options

- ☒ Create Message Header
- ☒ Create Message Trailer

Output Format

- ☐ Message
- ☐ Flat File
- ☐ Flat File with Control Record

Full Table Publish Rules page

Publish Rule ID Enter *BUS_UNIT_AV_FULLSYNC*. This rule publishes three fields (Business Unit, Description, Short Description) for all rows on the table to PeopleSoft Financials.

Status You must set this to *Active*.

Message Options You must select the check boxes next to Create Message Header and Create Message Trailer.

Synchronizing PeopleSoft Contributor Relations Business Unit Data With PeopleSoft Financials

Access the Full Data Publish page.

The screenshot shows the 'Full Data Publish' page. At the top, there's a 'Run Control ID' field with 'mbr' and a 'Run' button. Below this are links for 'Report Manager' and 'Process Monitor'. The main section is titled 'Process Request' and contains several fields: 'Request ID' (BUFSYNC), 'Description' (CR BU FullSync), 'Process Frequency' (radio buttons for Once, Always, Don't Run, with 'Once' selected), and 'Parameters' (Message Name: BUS_UNIT_AV_FULLSYNC). There are also navigation buttons like 'View All', 'First', '1 of 1', and 'Last'.

Full Data Publish page

To synchronize business units:

1. Enter a Request ID and Description.
2. Change Processing Frequency to *Once*.

Note. You can rerun this process without harming your system if the PeopleSoft Financials database becomes unsynchronized or corrupt.

3. Enter *BUS_UNIT_AV_FULLSYNC* in the Message Name field.
4. Click Run.

Once this process has run, the system keeps business units synchronized by triggering a message to the PeopleSoft Financials database whenever you change information in the Description or Short Description fields on the Business Unit CR page. In addition, the system triggers a message to PeopleSoft Financials whenever you add a new business unit.

Note. The message channel HR_SETUP enables one-way messaging and data publishing. To use this channel, you must configure the message node information by inserting the proper URL. PeopleSoft Financials must subscribe to these PeopleSoft Contributor Relations published messages in order to keep its database up to date.

See Also

PeopleSoft 8.4 Financials: General Ledger PeopleBook

Publishing Accounting Line Information Automatically

This section discusses how to run the AVPOST2 job.

Page Used to Publish Accounting Lines Automatically

Page Name	Object Name	Navigation	Usage
GL Interface (general ledger interface)	AV_RUN_CNTL_GL	<ul style="list-style-type: none"> Manage Contributor Relations, Enter Commitments, Process, G/L Interface, GL Interface Manage Contributor Relations, Manage Memberships, Process, G/L Interface, GL Interface 	Enter process parameters and run the AVPOST2 process, which creates accounting lines ready for publishing into your institution's PeopleSoft Financials system and activates the message that the lines are ready for PeopleSoft Financials 8.4.

Running the AVPOST2 Job

Access the GL Interface page. This page displays the PeopleSoft Financials Release that you selected on the CR Installation page.

See [Chapter 23, “Processing Commitments and Analyzing Giving History,” Running the GL Interface Process, page 433](#).

After you enter the appropriate information on the run control page and click the Run button, the Process Scheduler Request page appears.

From that page, run the AVPOST2 job, which contains:

- AVPACCTL—a COBOL process that creates accounting lines and puts the process instance entries into the PS_EO_MSGBATPRM table.
- EOP_PUBLISHA—an Automated Background Publish Application Engine that picks up all accounting lines created by AVPACCTL, based on the parameters in the PS_EO_MSGBATPRM table.
- AV_ACCUM—an Application Engine that accumulates constituent gift totals.

The AVPOST2 job runs similarly to the AVPOST job, but it replaces the SQR report output with the EOP_PUBLISHA process.

The EOP_PUBLISHA process does the following:

1. Selects accounting lines based on three criteria: process or job instance, process name, and process status.
2. Collects accounting line entries generated by the GL Interface AVPACCTL COBOL process and publishes them to the PeopleSoft Financials database.

PeopleSoft Financials subscribes to the published messages in the PeopleSoft Contributor Relations database, takes the accounting lines into their AV_ACCTG_LN table, and runs those lines through Journal Generator to create journals. PeopleSoft Financials then publishes the updated accounting lines, PeopleSoft Contributor Relations subscribes to these lines, and the data published by PeopleSoft Financials updates the PeopleSoft Contributor Relations AV_ACCTG_LN table.

The PeopleSoft Contributor Relations subscribe portion of the process updates seven fields on the AV_ACCTG_LN table:

- JOURNAL_ID

- JOURNAL_DATE
- JOURNAL_LINE
- FISCAL_YEAR
- ACCOUNTING_PERIOD
- GL_DISTRIB_STATUS
- AUDIT_ACTN

When the PeopleSoft Financials system returns accounting lines, the AUDIT_ACTN value on the PeopleSoft Contributor Relations AV_ACCTG_LN record is changed from *A* (add) to *C* (changed).

See Also

Chapter 23, “Processing Commitments and Analyzing Giving History,” Running the GL Interface Process, page 433

Publishing Accounting Line Information Manually

This section discusses how to process accounting lines manually. You may choose to run the publishing processes individually if you want to review your accounting lines before they are sent to PeopleSoft Financials.

To process accounting lines manually:

1. Set up batch publish rules (required for both automatic and manual processing).
2. Access the GL Interface page.
3. Run the CR/GL Post process (AVPACCTL) only.

Note. Do not run the AVPOST2 job.

4. Access the Batch Publish page.
5. Run the EOP_PUBLISHM process.

Note. You can set the EOP_PUBLISHM process to run at user-defined intervals.

Pages Used to Publish Accounting Lines Manually

Page Name	Object Name	Navigation	Usage
GL Interface (general ledger interface)	AV_RUN_CNTL_GL	<ul style="list-style-type: none"> Manage Contributor Relations, Enter Commitments, Process, G/L Interface, GL Interface Manage Contributor Relations, Manage Memberships, Process, G/L Interface, GL Interface 	Enter process parameters and run the AVPACCTL process, which creates accounting lines ready for publishing into your institution's PeopleSoft Financials system but does not activate the message that the lines are ready for PeopleSoft Financials 8.4.
Batch Publish	EO_BATCHPUB	Define Business Rules, Manage Integration Rules, Process, Batch Publish	Run the EOP_PUBLISHM process, which publishes batches of accounting lines into your institution's PeopleSoft Financials system.

Entering AVPACCTL Parameters

Access the GL Interface page. This page displays the PeopleSoft Financials Release that you selected on the CR Installation page.

After you enter the appropriate information on the run control page and click the Run button, the Process Scheduler Request page appears.

From that page, run the AVPACCTL process, which creates accounting lines and puts the process instance entries into the PS_EO_MSGBATPRM table.

See Also

[Chapter 24, "Interfacing with PeopleSoft Financials 8.4," Publishing Accounting Line Information Manually, page 514](#)

Running the EOP_PUBLISHM Process

Once you have manually generated accounting lines, access the Batch Publish page to publish them to your PeopleSoft Financials database.

Batch Publish

Run Control ID: ACK [Report Manager](#) [Process Monitor](#) [Run](#)

Process Request		View All	First	1 of 1	Last
*Request ID:	GPPUB				
Description:	Publish CR Acctg Lines				
Process Frequency					
<input checked="" type="radio"/> Once <input type="radio"/> Always <input type="radio"/> Don't Run					
Parameters					
*Process Name:	AVPACCTL				

Batch Publish page

Request ID and Description Enter an ID and describe the process.

Process Frequency Select *Once*.

Process Name Enter *AVPACCTL*.

After you enter the appropriate information on the Batch Publish page and click the Run button, the Process Scheduler Request page appears.

From that page, run the EOP_PUBLISHM process, which does the following:

1. Selects accounting lines based on three criteria: process or job instance, process name, and process status.
2. Collects accounting line entries generated by the GL Interface AVPACCTL COBOL process and publishes them to the PeopleSoft Financials database.

PeopleSoft Financials treats the published messages the same way, regardless of whether you generate the accounting lines automatically or manually.

See Also

[Chapter 24, "Interfacing with PeopleSoft Financials 8.4," Publishing Accounting Line Information Automatically, page 512](#)

Monitoring Message Results and Status

Use PeopleTools Application Message Monitoring pages to view published data and check the status of messages. This applies to all published and subscribed messages.

See Also

PeopleSoft 8.4 PeopleTools PeopleBook: PeopleSoft Application Messaging, “Application Message Monitor”

Viewing Accounting Lines

Use the Accounting Line inquiry page to review accounting lines that reside on the AV_ACCTG_LN table.

Journal Information tab

The fields on this tab display the information published to PeopleSoft Financials. The tab also contains the GL Journal Line Number, GL Journal ID, and Journal Date fields, which are populated with the data returned to PeopleSoft Contributor Relations through the STUDENT_ADV_ACCTG_LINE subscription message after the journals are generated in PeopleSoft Financials.

GL Chartfield 1 and 2 tabs

These tabs show information sent to PeopleSoft Financials. The following fields are currently populated by the GL Interface COBOL process:

- Fund
- Budget Reference Affiliate
- Chartfield 1
- Chartfield 2
- Chartfield 3

See Also

Chapter 23, “Processing Commitments and Analyzing Giving History,” Viewing Accounting Lines, page 449

Troubleshooting the Interface

This section discusses how to:

- Correct integration setup errors.
- Correct message channel errors.
- Correct messaging errors.

Correcting Integration Setup Errors

If you receive errors after setting up your PeopleSoft Contributor Relations system to integrate with PeopleSoft Financials 8.4, there are several areas where you can review your settings and make the necessary corrections.

The following reminders apply to general integration setup:

- You must set up Batch Publish Rules for the STUDENT_ADV_ACCTG_LINE message.
- You must set up Full Table Publish Rules for the BUS_UNIT_AV_FULLSYNC message.
- You must set the PeopleSoft Financials Release to 8.4 on the CR Installation page.

See Also

[Chapter 24, “Interfacing with PeopleSoft Financials 8.4,” Defining Batch Publish Rules, page 508](#)

[Chapter 24, “Interfacing with PeopleSoft Financials 8.4,” Setting Up Business Unit Synchronization, page 510](#)

[Chapter 24, “Interfacing with PeopleSoft Financials 8.4,” Identifying Financials Software Version, page 508](#)

Correcting Message Channel Errors

If a published message remains in *New* status and does not complete its path and change the status to *Done*, or if the message does not appear in the Application Messaging Monitor after the process to generate it is complete, verify channel settings in Application Designer. The following tips apply to the channels HR_SETUP and STUDENT_ADMIN_ACCOUNTING.

Note. HR_SETUP channel is for the Business Unit messages and STUDENT_ADMIN_ACCOUNTING channel is for the Accounting line message.

- Open the Message Channel, go to Message Channel Properties, and make sure the Message Channel Status is set to *Run* for both of these channels.
- The HR_SETUP channel routing direction should be set to *Publish to*, and a valid Message Node Name should be specified.
- The BUS_UNIT_AV_FULLSYNC, and BUS_UNIT_AV_SYNC messages should appear under the Messages tab for the HR_SETUP channel.
- The STUDENT_ADMIN_ACCOUNTING channel routing direction should be set to *Both (Publish and Subscribe)*, and a valid Message Node Name should be specified.
- The STUDENT_ADV_ACCTG_LINE message should appear under the Messages tab for the STUDENT_ADMIN_ACCOUNTING channel.
- For each Message Channel, confirm that the Routing Rules are set up correctly. Confirm the correct Message Node Name for each channel.

Correcting Messaging Errors

If a published message remains in *New* status rather than completing its path and changing status to *Done*, or if the message does not appear in the Application Messaging Monitor after the process to generate it is complete, check your security settings.

To check security settings:

1. Navigate to PeopleTools, Maintain Security, Use, Permission Lists.
2. Enter a Permission List value.
3. Select the Message Monitor tab.
4. Determine whether the channel(s) appear there.

5. If the channels do not appear, enter HR_SETUP and STUDENT_ADMIN_ACCOUNTING in the Channel Name fields.
6. Based on your security business rules, select *Full* or *Read Only* access for each channel.
7. Save the changes.

You should now be able to return to the Application Message Monitor and search for a particular message/channel.

You should also verify your channel settings in Application Designer. Verify these items in both the PeopleSoft Contributor Relations and PeopleSoft Financials databases. The following tips apply to the messages BUS_UNIT_AV_FULLSYNC, BUS_UNIT_AV_SYNC, and STUDENT_ADV_ACCTG_LINE.

- Open the Message Definition, go to Message Properties, make sure that the Active Status check box is selected.
- Make sure that the correct Message Channel is specified for the Message Definition (that is, HR_SETUP channel is for the Business Unit messages and STUDENT_ADMIN_ACCOUNTING channel is for the accounting line message).
- In Application Message Monitor, check the Channel Status tab. The channel status must be *Running*.
- Message Nodes are set up correctly, including the correct Location/URL.

You should also verify your message definition settings in Application Designer. Verify statuses for the PeopleSoft Contributor Relations message subscription STUDENT_ADV_ACCTG_LINE and the PeopleSoft Financials 8.4 message subscriptions BusUnitAVFullSync, BusUnitAVSync, and StudentAdvancementAcctgLine.

To verify status:

1. Open the Message Definition, then the Message.
2. Right-click the Message Subscription.
3. Make sure the Active Status check box is selected.

You should also ping the publishing and subscribing database nodes.

To ping a database node:

1. Sign on to the PeopleSoft Contributor Relations database.
2. Navigate to PeopleTools, Application Message Monitor, Use, Application Message Monitor, Node Status tab.
3. Enter the Message Node Name.
4. Click the Ping Node button.
5. If the node does not ping successfully, the gateway is bad; check the Node and Node URL.
6. If the node pings successfully, sign on to the PeopleSoft Financials database and ping the PeopleSoft Contributor Relations database node using Integration Broker.

See *PeopleSoft PeopleTools PeopleBook: Integration Broker, "Understanding Integration Broker"*

If changes are made to Message Channels and/or Message Nodes, it is a good idea to stop and then start the Application Server. You can also delete the Application Server cache.

CHAPTER 25

Managing Involvement and Self-Service Credit Card Transactions

This chapter provides an overview of Involvement as well as the self-service online giving and pledge life cycles, and discusses how to:

- Access Involvement.
- Give online to the institution.
- Make a pledge online to the institution.
- Monitor self-service commitment summary.
- Monitor self-service giving club progress.
- Monitor self-service membership history.
- Generate self-service gift and pledge sessions.
- Balance, queue, and post self-service gift and pledge sessions.
- Process self-service credit card transactions.
- Manage denied self-service transactions.
- Adjust self-service gift credit card payments.
- Investigate self-service gift transactions.

Note. This chapter contains new functionality related to Update ID #112126 that was posted to Customer Connection in November 2002.

Understanding Involvement

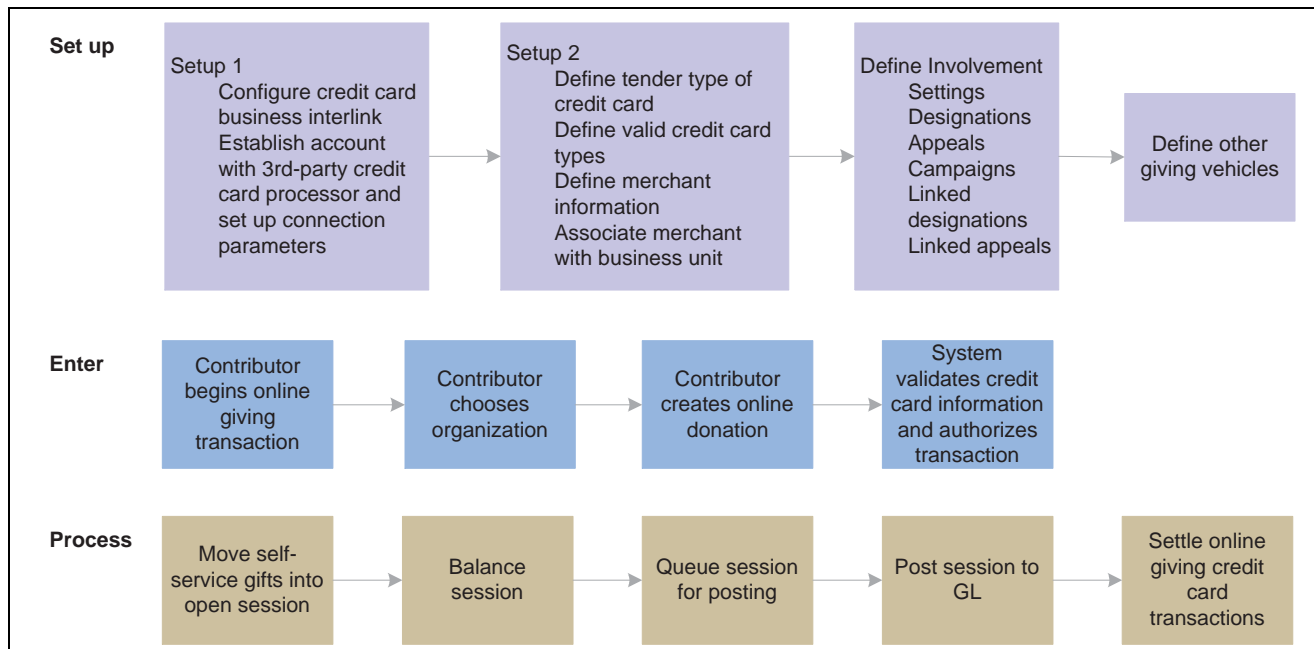
PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions offer self-service applications that are licensed separately. If you have licensed the Involvement application, you can use the self-service pages described here.

See *PeopleSoft 8 SPI Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, “Introducing Collaborative Applications”.

Virtually all fundraising organizations have established, or are in the process of establishing, a web presence that provides self-service facilities to their contributors. These organizations need the ability to accept and process credit card payments online when receiving a donation. Using Involvement’s online giving functionality, both new and existing contributors can give to the organization in a secure, online environment. In addition, Involvement offers online visitors the option to create a scheduled pledge.

Understanding the Self-Service Online Giving Life Cycle

There are three stages in the life cycle of self-service online giving. The steps within these stages may vary, depending on a contributor's choices, but the following diagram provides a high-level view.



Overview of the online giving life cycle

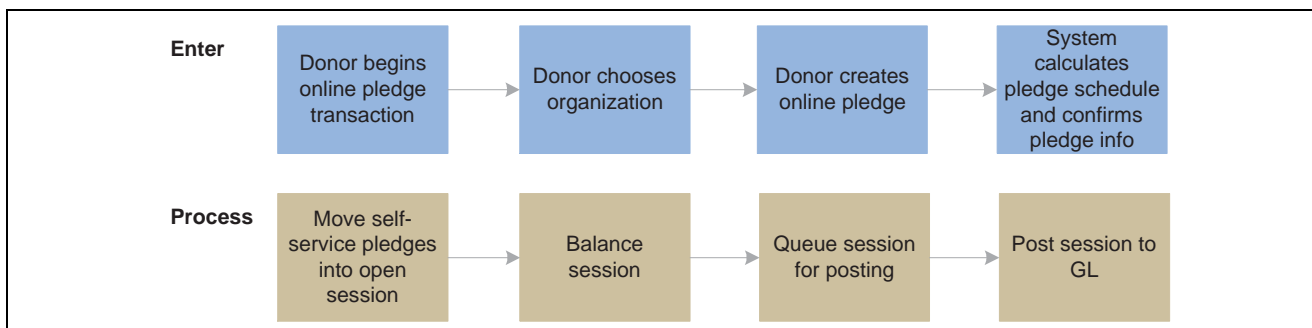
See Also

[Chapter 23, "Processing Commitments and Analyzing Giving History," Understanding Credit Card Processing, page 424](#)

Customer Connection: Support: Documentation, Documentation Updates by Category, PeopleBook Enhancements, Financials, "PeopleSoft Credit Card Interlink Installation and Technical Notes"

Understanding Self-Service Online Pledges

Once your institution sets up online giving functionality, the process for entering and processing online pledges is similar to that for online gifts. There are two stages in the online pledge life cycle, as you can see in the following diagram.



Overview of the online pledge life cycle

Accessing Involvement

This section discusses how to access the Involvement home page and all of the linked areas it contains.

Page Used to Access the Involvement Home Page

Page Name	Object Name	Navigation	Usage
Involvement	INVOLVEMENT_HOME	CR Self Service, Involvement, Home, Involvement	Donors access options for donating online and viewing their commitment history.

Working With the Involvement Home Page

Contributors can click the appropriate link to access the online options on this page; those options are to choose a way to give as well as view a commitment summary, giving club progress, and membership history.

Navigation is the same throughout all of the Involvement online giving pages.

- Next takes contributors to the next page in the process.
- Previous takes contributors back one page.
- Return to Involvement takes contributors to the Involvement home page.
- Mail In Donation Form takes contributors to the Mail In Donation page

See Also

[Chapter 25, “Managing Involvement and Self-Service Credit Card Transactions,” Choosing a Way to Give, page 527](#)

[Chapter 25, “Managing Involvement and Self-Service Credit Card Transactions,” Monitoring Self-Service Commitment Summary, page 532](#)

[Chapter 25, “Managing Involvement and Self-Service Credit Card Transactions,” Monitoring Self-Service Giving Club Progress, page 533](#)

[Chapter 25, “Managing Involvement and Self-Service Credit Card Transactions,” Monitoring Self-Service Membership History, page 533](#)

Giving Online to the Institution

If you have set up online giving so that the default option presents a single organization to receive the donation, contributors begin the online giving process by proceeding directly to the Ways to Give page. However, if the system finds multiple active organizations defined, contributors must first select an organization to receive their donation.

Depending on which way they choose to give, the system presents contributors with a series of pages to enter donation specifics and credit card information. If contributors choose not to give over the internet, they also have the option of printing a mail-in donation form.

This section discusses how to:

- Choose an organization.
- Choose a way to give to the organization.
- Start the online giving process.
- Enter gift information.
- Enter payment information.
- Confirm and submit payment information.
- View fund information.
- View payment results.
- Choose an existing campaign.
- Donate to an existing campaign.
- Give by mail.

Understanding Secure Online Giving

To donate online, contributors use four steps to guide them through the process. These steps help donors:

1. Navigate through the process.
2. Designate their gift amount and gift distribution.
3. Enter credit card, billing address, and other contact information.
4. Review the information they entered on the previous pages and complete the transaction.

Prerequisites

Some of the pages used during online giving require you to define information prior to their use by self-service contributors.

- Before donors can choose an organization to receive their gift (using the Donations – Choose Organization page), you must first define multiple institutions.
- In order for donors to see options on the Ways to Give page, you must first define the following:
 - Define web campaigns on the Web Campaigns page.

- Define giving vehicles on the Defining Giving Vehicles page.
- Define settings and contact information on the Involvement Setup page.
- Define credit card merchant information on the CR Merchants page.
- Before donors can give to an existing campaign, you must first define campaigns on the Web Campaigns page.

See Also

Chapter 12, “Setting Up Commitment Management,” Setting Up Self-Service Online Giving and Pledges, page 146

Pages Used to Give Online

Page Name	Object Name	Navigation	Usage
Donations – Choose Organization	AV_INVLV_G_INST	<ul style="list-style-type: none"> Click the Ways to Give link on the Involvement Home page. CR Self Service, Involvement, Tasks, Ways to Give 	Donors select an organization to receive their donation.
Ways to Give	AV_INVLV_G_WAYS	Click a link under the Description heading on the Donations – Choose Organization page.	Donors review donation options for the organization they selected on the Choose Organization page.
Make a Donation – Welcome	AV_INVLV_G_INTRO	Click the Make your gift securely online link on the Ways to Give page.	Donors see the Welcome page first when they begin the online donation process.
Make a Donation – Gift Information	AV_INVLV_G_GFT	Click the Next button on the Make a Donation – Welcome page.	Donors designate their gift amount, gift terms, and gift distribution.
Make a Donation – Payment Information	AV_INVLV_G_CC	Click the Next button on the Make a Donation – Gift Information page.	Donors enter credit card, billing address, and other contact information.
Make a Donation – Confirm and Submit	AV_INVLV_G_CNF	Click the Next button on the Make a Donation – Payment Information page.	Donors review the credit card, billing address, and other contact information entered on the previous page, then to finalize the transaction.
Fund Information	AV_INVLV_G_DES	Click the View Fund Information link on the Make a Donation – Confirm and Submit page.	Donors view details about the funds designated on the Make a Donation – Gift Information page.
Payment Result	AV_INVLV_G_END	Click the Submit button on the Make a Donation – Confirm and Submit page.	Donors confirm that the online giving session is complete.
Donations – Campaigns	AV_INVLV_G_CMPGN	Click the Invest online in existing campaigns link on the Ways to Give page.	Donors select a campaign to receive their donation.
Mail In Donation Form	AV_INVLV_G_FORM	Click the Mail-in donation form link on the Ways to Give page.	Donors can print the form, complete it by hand, and mail it to the institution.

Choosing an Organization

On the Donations – Choose Organization page, contributors select an organization name to access the Ways to Give page. In order for this page to appear, you must have previously defined more than one active institution on the Involvement Setup page.

Choosing a Way to Give

Contributors choose one of three options on the Ways to Give page. These options are predefined for your organization.

- *Make your gift securely online.* This link takes contributors directly into the online donation process. On these pages, contributors choose to apply the donation to specific campaigns, fund designations, and appeals.
- *Invest in existing campaigns.* This link takes contributors to a list of campaigns predefined by the organization. On these pages, contributors select a campaign; the organization associates specific designations and appeals with that campaign. These campaign-specific designations and appeals appear as valid available values for the selected campaign.
- *Mail-in donation form.* This link is for contributors who are not comfortable providing their credit card information over the internet. It takes them to a printable form to complete and mail. This option also lists the address to send the donation form. Define the mailing address on the Involvement Setup page.

Organizations can define other ways to give, using the Giving Vehicles setup page. Giving vehicles set up previously appear under the Other Ways to Give heading.

To donate to a different organization, contributors can click the View Information for Other Organization link and return to the Choose Organization page.

See Also

[Chapter 12, “Setting Up Commitment Management,” Defining Giving Vehicles, page 157](#)

Starting the Online Giving Process

The Make a Donation – Welcome page welcomes the visitor and explains how to navigate through the online giving process. The page also provides information about the mail-in donation form and organization contact information.

Entering Gift Information

Access the Make a Donation – Gift Information page.

Gift Detail Information

In the fields in this section, contributors enter the amount of their donation and decide whether or not to give anonymously. If they are donating to a specific fundraising campaign, they select it here. The organization also collects information about how the contributor heard about the fundraising effort.

Finally, contributors decide whether to apply their gifts to the organization’s greatest need or to particular funds. If a contributor selects the Apply my gift to the greatest need option, where the system applies the gift depends on which entry link the contributor chooses on the Ways to Give page. If the contributor enters through the Give securely online link, the system applies the gift to the default designation defined on the Web Designations page. If the contributor enters through the Invest in existing campaigns link, the system applies the gift to the default linked designation defined on the Campaign Linked Designations page. If a contributor selects the Send my gift to the following funds option, the Fund Information section appears.

Fund Information

Contributors can select a specific designation and enter a specific portion of their donation to go to that fund. They can click the Add Fund button to designate additional funds and portions of their donation, or they can click the Evenly Distribute Gift button to divide their total donation evenly among the selected designations.

The fund values displayed in this section are defined on the Web Designations page. Once a contributor chooses to send a gift to specific funds, rather than contribute to the organization's greatest need, the designation value and amount fields become required to process a gift session. Contributors can use the Comments area to enter special requests, tribute information related to the donation, and so on.

When contributors navigate to the next page, the system verifies whether the total amounts designated equal the Total Gift Amount; if they do not, the system returns an error message. Contributors can manually adjust their fund designation amounts until the total matches their Total Gift Amount or click the Evenly Distribute Gift button.

Entering Payment Information

On the Make a Donation – Payment Information page, contributors enter their credit card information. CyberSource requires an email address, but does not validate it; if the user leaves this field blank, the system uses the email address from the associated Merchant table. The system populates as much personal information as is available (based on the address and other type settings found on the Campus Community Installation Setup page), but a contributor can modify any field.

When a contributor navigates to the next page, the system performs an internal system check to ensure all required information has been entered properly and prompts for corrections if it finds any errors or missing information.

Confirming and Submitting Payment Information

The Make a Donation – Confirm and Submit page displays online gift details for the contributor's review. Contributors can access the View Fund Information page where they can review a page of details about the funds they designated on the Make a Donation – Gift Information page.

Viewing Fund Information

Once the contributor determines that the information on the Fund Information page is correct, they can Submit the online gift transaction. The system sends the credit card information out to a third-party credit card payment processor to authorize the gift amount. If the transaction fails, for example due to invalid card or billing information, the Payment Result page displays an error message.

See Also

[Chapter 23, "Processing Commitments and Analyzing Giving History," Processing Credit Card Transactions, page 436](#)

Viewing Payment Results

Once the transaction is successfully authorized, the Payment Result page appears, thanking the contributor by name for the donation. This page also provides a receipt number and transaction summary, which the contributor can print and keep as a record. The system generates a hardcopy receipt to be mailed later, using the current PeopleSoft Contributor Relations Acknowledgement process.

If the payment is not successful, the Payment Result page displays an error message.

See Also

Chapter 23, “Processing Commitments and Analyzing Giving History,” Generating Acknowledgement Letters, page 462

Choosing an Existing Campaign

The Involvement Setup page enables organizations to define campaigns and link related designations and appeals to that campaign. The link Invest online in existing campaigns brings the donor through the online giving pages but displays only designations and appeals related to the selected campaign.

Donating to an Existing Campaign

Access the Donations – Campaigns page. This page lists each campaign your organization has defined on the Web Campaigns page. Once a contributor clicks a campaign link on this page, the system proceeds to the Make a Donation – Welcome page. From there, the online giving process continues in much the same way as it does when contributors give securely online.

However, when investing in existing campaigns, the Make a Donation – Welcome page displays the name and description of the selected web campaign in addition to the standard welcome and navigational information.

In addition, on the Make a Donation – Gift Information page, if the contributor chooses to apply the donation to specific funds, the Fund Information area displays the default fund designation and appeal options linked to the campaign. However, the contributor can use the Lookup feature to select other appeals and designations associated with that specific campaign.

Giving by Mail

Online visitors who do not want to transmit personal information via the internet can use the Mail In Donation Form to contribute. Contributors can print this page using their web browser's Print functionality, then complete it and mail it to the organization.

Note. The Mail To name and address information at the top of the page is defined on the Involvement Setup page.

Making a Pledge Online

To make a pledge online, donors use four steps to guide them through the process. These steps help donors:

1. Choose to make a pledge and learn to navigate through the online pledge process.
2. Designate a pledge amount and fund distribution.
3. Enter a pledge schedule and other contact information.
4. Review all of their information and complete the pledge.

Pages Used to Enter Self-Service Online Pledges

Page Name	Object Name	Navigation	Usage
Involvement	INVOLVEMENT_HOME	CR Self Service, Involvement, Home, Involvement	Donors access options for donating online and viewing their commitment history.
Donations – Ways to Give	AV_INVLV_G_WAYS	<ul style="list-style-type: none"> • CR Self Service, Involvement, Home, Involvement, Ways to Give • CR Self Service, Involvement, Tasks, Ways to Give 	Donors review donation options set up by the institution.
Donations – Campaigns	AV_INVLV_G_CMPGN	Click the Invest in existing campaigns link on the Donations – Ways to Give page.	Donors view existing campaigns and select a campaign to receive the gift or pledge.
Make a Donation – Welcome	AV_INVLV_G_INTRO	<ul style="list-style-type: none"> • Click the Make a pledge online link on the Donations – Ways to Give page. • Click the Pledge to this campaign link next to a campaign name on the Donations – Campaigns page. 	Donors see the Welcome page first when they begin the online gift or pledge process.
Make a Donation – Pledge Information	AV_INVLV_P_PL	Click the Next button on the Make a Donation – Welcome page.	Donors enter pledge detail and fund distribution information.
Make a Donation – Payment Information	AV_INVLV_P_CNT	Click the Next button on the Make a Donation – Pledge Information page.	Donors set up a pledge payment schedule and enter or verify their contact information.
Make a Donation – Confirm and Submit	AV_INVLV_P_CNF	Click the Next button on the Make a Donation – Payment Information page.	Donors review their pledge information and payment schedule, and then submit the pledge.
Fund Information	AV_INVLV_G_DES	Click the View Fund Information link on the Make a Donation – Confirm and Submit page.	Donors view details about the funds designated on the Make a Donation – Pledge Information page.
Payment Result	AV_INVLV_P_END	Click the Submit button on the Make a Donation – Confirm and Submit page.	Donors see the Payment Result page when their online pledge is created.
Mail-in Donation Form	AV_INVLV_G_FORM	Click the Mail-in Donation Form link on the Donations – Ways to Give, Make a Donation – Payment Information, or Make a Donation – Confirm and Submit pages.	Online visitors who do not want to transmit personal information using the internet can use this form to submit pledge information.

Choosing a Way to Give

There are two links on the Donations – Ways to Give page that enable donors to begin the pledge process. *Invest in existing campaigns* takes donors to the Donations – Campaigns page, where they can first choose a campaign to receive their pledge. *Make a pledge on-line* takes donors to the Make a Donation – Welcome page; later in the process they can choose a campaign to receive their pledge.

Investing in an Existing Campaign

If donors click the *Invest in existing campaigns* link, the Donations – Campaigns page appears. It describes all existing campaigns activated by the institution for online giving on the Web Campaigns setup page. Each campaign has an indicator next to it for donors to either *Give to this campaign* or *Pledge to this campaign*.

When donors click the *Pledge to this campaign* link, the system takes them to the Make a Donation – Welcome page for pledges. The welcome text on the page includes the campaign name selected on the Donations – Campaigns page.

Making a Pledge Online

If donors click the Make a pledge on-line link, the Make a Donation – Welcome page appears. It welcomes the visitor by name and explains how to navigate through the online pledge process. This page also provides institution contact information and a link to the mail-in donation form.

Entering Pledge Information

Donors access the Make a Donation – Pledge Information page and enter the amount of their pledge.

This page changes, depending on which link donors use on the Donations – Ways to Give page.

- If donors enter this page through the Make a pledge on-line link, they can choose a specific campaign to receive the pledge.
- If they enter this page through the Invest in existing campaigns link, they've already selected a campaign so no campaign choices are offered here.

Regardless of how donors enter this page, they can choose an appeal code and designation fund options for their pledge.

If Donors Are Making a Pledge to an Existing Campaign

The page displays only designations and appeals related to the campaign selected on the Donations – Campaigns page. Also, the Fund Information section displays the default fund designation and appeal options linked to that campaign.

Entering Payment Information

Donors access the Make a Donation – Payment Information page to create a pledge payment schedule and to enter or verify their contact information on file.

Available options for a donor's pledge payment schedule include the start and end dates of the pledge period, frequency of pledge payment, and number of payment installments.

Note. For the system to generate a pledge schedule, donors must enter either a number of installments or a last payment date.

Confirming and Submitting a Pledge

Donors access the Make a Donation – Confirm and Submit page to review their pledge information and finalize the transaction.

On this page, donors can review the information they entered on the Make a Donation – Payment Information page. The system also displays the generated expected pledge schedule. To generate the pledge schedule, the system divides the total pledge amount into equal installments, based on information entered on the Make a Donation – Payment Information page. It then calculates the expected payment dates and amounts to fulfill the pledge.

Once the donor confirms and submits the pledge information, the system does the following:

1. Saves the pledge information.
2. Generates a receipt number for the pledge.
3. Displays the Payment Result page, which includes a personalized thank you message, the receipt number, and a final summary of the pledge information, designation information, and pledge schedule information.

Note. The system does not charge the donor's credit card or process any transaction at this time.

Monitoring Self-Service Commitment Summary

This section discusses how donors use these pages to view information about their history of giving to the institution during a self-service session.

Pages Used to Monitor Self-Service Commitment Summary

Page Name	Object Name	Navigation	Usage
Commitment Summary	AV_SS_P_CS_ORG, AV_SS_P_CMTMT_SMRY	CR Self Service, Involvement, Tasks, Commitment Summary, Commitment Summary Org	Donors view information about their history of giving to the institution.
Fiscal Year Details	AV_SS_CS_SP	Click the Fiscal Year link on the Commitment Summary page.	View details about their giving during a particular year.

Using the Commitment Summary Page

Donors can view information about lifetime giving and a summary of giving by fiscal year. If the donor has given to more than one institution, he or she can view information for each institution on separate versions of the page.

For each fiscal year summary, the donor can access details of his or her giving during that particular year.

Monitoring Self-Service Giving Club Progress

This section discusses how donors monitor progression through giving clubs during a self-service session.

Page Used to Monitor Self-Service Giving Club Progress

Page Name	Object Name	Navigation	Usage
Giving Club Progress	AV_SS_P_GC_ORG, AV_SS_P_GCLUB	CR Self Service, Involvement, Tasks, Giving Club Progress	Donors view information about their progression through giving clubs and various club levels. If the donor has given to more than one institution, he or she can view information for each institution on separate versions of this page.

Monitoring Self-Service Membership History

This section discusses how donors view information about their participation in member organizations at the institution during a self-service session.

If the member belongs to member organizations for more than one institution, he or she can view information for each institution on separate versions of this page.

Members can click the Membership Organization link in any row to view more detailed information about a particular membership in the Membership Detail group box.

Page Used to View Self-Service Membership History

Page Name	Object Name	Navigation	Usage
Membership History	AV_SS_P_MB_ORG, AV_SS_P_MBR_INQ	CR Self Service, Involvement, Tasks, Membership History, Membership History Org	View information about their participation in member organizations at the institution.

Generating Self-Service Gift Sessions

This section discusses how to generate sessions of self-service gifts.

Prerequisites

In order to generate self-service gift sessions, unprocessed, authorized self-service credit card gift transactions must exist in the system.

Page Used to Generate Self-Service Gift Sessions

Page Name	Object Name	Navigation	Usage
Self Service Giving	AV_RUNCTL_INVLV	Manage Contributor Relations, Enter Commitments, Process, Self Service Gifts	Run the process that moves self-service gifts and pledges into open self-service sessions.

Creating Self Service Gift and Pledge Sessions

Access the Self Service Giving page.

When you run the AV_INV_SESS process, the system does the following:

1. Looks at all institutions set up for online giving.
2. Moves self-service gifts and pledges into open self-service sessions.

You can configure Process Scheduler to run the Self Service Gifts process at user-defined intervals. Once the process completes, the data is saved and the session remains open.

Note. Due to the nature of credit card transactions, PeopleSoft recommends that the specified time frame between running the AV_INV_SESS process be no more than 24 hours.

You can also configure the AV_INV_SESS process to notify a particular user (or all users in a particular role) via email of process completion. By transferring the process log on notification, users can know which self-service sessions are open for processing.

Balancing, Queuing, and Posting Self-Service Gift Sessions

Once you have a complete credit card session, as with any other type of session you must balance it, queue it for posting, and post it to the general ledger. When you use the Maintain Sessions page to balance a session, you can see whether the session was created as a result of online giving or online pledges; self-service sessions are noted with a check box.

In addition, when you use the Queue Sessions page to queue a session for posting, you can filter the page to show only self-service sessions by selecting the Self Service Session check box.

See Also

[Chapter 22, “Entering Commitments,” Creating and Working With Sessions, page 373](#)

[Chapter 23, “Processing Commitments and Analyzing Giving History,” Queuing Sessions for Posting, page 426](#)

[Chapter 23, “Processing Commitments and Analyzing Giving History,” Processing and Posting Sessions, page 427](#)

Processing Self-Service Credit Card Transactions

This section discusses how to:

- Select self-service gift transactions for processing.
- Settle self-service gift transactions.

Understanding Self-Service Transaction Types

Once you have posted a credit card gift to the general ledger, you can then process it through the third-party payment processor, CyberSource. PeopleSoft Contributor Relations supports the following transaction processes through CyberSource:

- *Authorization* – authenticates the credit card number and places a temporary hold on the specified amount against the cardholder’s credit card. Also generates an authorization number and reduces the cardholder’s available credit by the authorized amount. If the credit card information is not correct, or the cardholder does not have available credit, the system generates a message declining the transaction. Note that CyberSource does not bill the credit card at this time; it only verifies that the card is valid for the charge.

Note. All credit card payments for gifts made through self-service pages are authorized during online giving. Therefore, self-service gift sessions are ready to proceed directly to the settlement process.

- *Settlement* – confirms the temporary hold placed on credit card funds after a transaction has been authorized and bills the credit card.
- *Credit* – issues a refund to a customer’s credit card account after an adjusted gift.

See Also

Chapter 23, “Processing Commitments and Analyzing Giving History,” Understanding Credit Card Processing, page 424

Prerequisites

In order to process self-service credit card transactions, the following conditions must exist:

- Before you can select transactions for processing, using the EP Transaction Processing – Filter Options page, posted gift sessions must exist with the tender type of *Credit Card*.
- Before you can settle transactions, using the EP Transaction Processing – Transaction List page, valid, posted gift credit card transactions must exist in the system.
- Before you can select denied transactions for processing, using the EP Denied Transactions – Filter Options page, denied posted gift credit card transactions must exist in the system.
- Before you can settle denied transactions, using the EP Denied Transactions – Transaction List page, denied posted gift credit card transactions must exist in the system.

Pages Used to Process Self-Service Credit Card Transactions

Page Name	Object Name	Navigation	Usage
EP Transaction Processing – Filter Options	AV_EP_FLTR	Manage Contributor Relations, Enter Commitments, Process, EP Transaction Processing	Enter your selection criteria for the gifts to process.
EP Transaction Processing – Transaction List	AV_EP_G_PROC	Click the Search button on the EP Transaction Processing – Filter Options page.	Select and settle gift transactions that meet the criteria you entered on the EP Transaction Processing – Filter Options page.

Selecting Self-Service Gift Transactions for Processing

Access the EP Transaction Processing – Filter Options page.

EP Transaction Processing – Filter Options page

Institution Enter an institution code.

Business Unit Enter a business unit for the gift transactions to process. If you leave the business unit blank, you view all gifts for the organization.

Note. You must specify a business unit here to use the rest of the filter choices on this page.

Tender Type Enter the electronic processing tender type for the gift transactions to be processed (the system populates this field to the electronic payment type *Credit Card* by default).

Note. PeopleSoft uses “CC” to designate this electronic payment tender type. However, you can define it as anything using the Tender Types page.

Transaction Requested

Select *Settle* to settle the self-service gift transactions. Other delivered values for transaction processes currently supported by CyberSource are: *Authorize*, *AuthSettle*, and *Credit*.

Note. *AuthSettle* is not a valid process for self-service gifts.

Self Service Session

Select *Only Self Service* to select gifts made through the self-service Make a Donation pages only. Other delivered values include *All Sessions* and *Non Self Service*.

Post Date

Enter dates to select gifts posted within the range of From and To date values.

Session Number

Enter a session number to select gifts made in this specific session only. To display a session, you must enter a business unit.

Gift

Enter a gift number to select gifts made with this gift number only. To display a specific gift, you must enter a business unit.

Settling Self-Service Gift Transactions

Access the EP Transaction Processing – Transaction List.

Note. On the EP Transaction Processing – Filter Options page, set Transaction Requested to *Settle*.

EP Transaction Processing Transaction List										
Institution:		PSUNV PeopleSoft University								
Transaction Requested:		Settle								
Self Service Session:		Only Self Service								
		Process Monitor Set Filter Options								
		View All First 1-7 of 20 Last								
Select	Payment Status	Business Unit	Tender	Session Nbr	Gift Nbr	Post Dt	Auth Dt	Reference Nbr	ID	Gift Amt
<input type="checkbox"/>	Authorized	MEDBU	CC	196	391	11/10/2001	11/10/2001	89	8664	100.00
<input type="checkbox"/>	Authorized	MEDBU	CC	196	392	11/10/2001	11/10/2001	91	AV0007	85.00
<input type="checkbox"/>	Authorized	MEDBU	CC	215	416	11/13/2001	11/13/2001	131	8664	10.00
<input type="checkbox"/>	Authorized	MEDBU	CC	215	417	11/13/2001	11/13/2001	133	8664	10.00
<input type="checkbox"/>	Authorized	MEDBU	CC	215	418	11/13/2001	11/13/2001	134	8664	10.00
<input type="checkbox"/>	Authorized	MEDBU	CC	215	419	11/13/2001	11/13/2001	135	8664	200.00
<input type="checkbox"/>	Authorized	MEDBU	CC	215	420	11/13/2001	11/13/2001	136	8664	210.00
<input type="button" value="Select All"/>		<input type="button" value="Process"/>								

EP Transaction Processing – Transaction List page

The following fields on this page are defined on the EP Transaction Processing – Filter Options page: Business Unit, Tender, Session Nbr, Gift Nbr, and Post Dt.

Select	Select the check box for each row to process.
Select All	Click this button to select check boxes for all rows.
Payment Status	Displays the current transaction status. If you click a link under this heading, a page appears that displays all existing transaction processing information. All transactions ready to be settled have a Payment Status of <i>Authorized</i> .
Auth Dt (authorization date)	Once the transaction is authorized, the system populates this field.
Reference Nbr (reference number)	Once the transaction is sent, the system populates this field with a system-generated reference number used to communicate with the third-party credit card payment processor.
ID	Displays the ID of the contributor.
Gift Amt (gift amount)	Displays the amount of the gift credit card transaction.
Process	Click to run the settlement process. The system gathers the transactions you select and sends them to the third-party credit card payment processor.
<hr/>	
Important! After you click the Process button, give the process at least 30 seconds to run.	
<hr/>	
Process Monitor	Click to review the status of the settlement process.
Set Filter Options	Click to return to the EP Transaction Processing – Filter Options page.

If any transactions are not settled successfully, you must complete them using the denied transactions process or using a gift adjustment session.

Working With Denied Self-Service Transactions

When you attempt to authorize or settle self-service credit card gift transactions, you occasionally receive denial messages from your third-party credit card payment processor. Denials occur for many reasons, including invalid card number, account over limit, internet communication problems with the third-party credit card payment processor, and so on.

To resolve denied transactions, use the EP Denied Transactions – Filter Options and EP Denied Transactions – Transaction List pages to perform the following functions: retry the settlement or credit processes, decide to handle the transaction manually, or cancel the payment of the transaction.

This section discusses how to:

- Select denied self-service gift transactions.
- Settle denied self-service gift transactions.

Pages Used to Work With Denied Self-Service Transactions

Page Name	Object Name	Navigation	Usage
EP Denied Transactions – Filter Options	AV_EP_FLTR	Manage Contributor Relations, Enter Commitments, Process, EP Denied Transactions	Enter your selection criteria for the gift transactions to process.
EP Denied Transactions – Transaction List	AV_EP_G_PROC	Click the Search button on the EP Transaction Processing – Filter Options page.	Select and settle denied gift transactions that meet the criteria you entered on the EP Denied Transactions – Filter Options page.

Selecting Denied Self-Service Gift Transactions for Processing

Access the EP Denied Transactions – Filter Options page.

EP Transaction Processing
Filter Options

***Institution:** PeopleSoft University

Business Unit: Medical Business Unit

Tender Type: Credit Card

Transaction Requested:

Item
<div> Self Service Session <ul style="list-style-type: none"> <input type="radio"/> All Sessions <input checked="" type="radio"/> Only Self Service <input type="radio"/> Non Self Service </div> <div> Post Date <p>From <input type="text" value="10/01/2001"/> </p> <p>To <input type="text" value="12/14/2001"/> </p> </div> <div> <p>Session Number: <input type="text"/> </p> <p>Gift: <input type="text"/> </p> </div>

EP Denied Transactions – Filter Options page

Use this page in the same way that you select gifts for settlement; the difference is that the EP Denied Transactions – Filter Options page only searches those transactions that your third-party credit card payment processor denied.

The fields on this page are the same as those on the EP Transaction Processing – Filter Options page. For denied gift transactions, however, the Transaction Requested value you select is the stage at which the gift transaction is denied, such as during settlement.

See Also

[Chapter 23, “Processing Commitments and Analyzing Giving History,” Selecting Gift and Membership Transactions for Processing, page 440](#)

Settling Denied Self-Service Gift Transactions

Access the EP Denied Transactions – Transaction List page.

Note. To settle, on the EP Denied Transactions – Filter Options page set Transaction Requested to *Settle*.

EP Denied Transactions
Transaction List

Institution: PSUNV PeopleSoft University
Transaction Requested: Settle
Self Service Session: Only Self Service

[Process Monitor](#) [Set Filter Options](#)

[View All](#) First 1 of 1 Last

Select	Payment Status	Business Unit	Tender	Session Nbr	Gift Nbr	Post Dt	Reference Nbr	ID	Gift Amt	Result
<input type="checkbox"/>	Declined	MEDBU	CC	476	783	12/13/2001	0000000000000316	AV3007	110.00	Decline

[Select All](#) [Process](#) [Manual](#) [Cancel Pmt](#)

EP Denied Transactions – Transaction List page

After you select the appropriate rows, click the Process button to retry the transaction.

Click the Manual button to handle a denied transaction manually. For example, you may want to call the contributor, adjust the gift, or contact your third-party credit card payment processor directly to resolve the transaction.

Click the Cancel Pmt button to cancel the transaction. However, the transaction remains in the system. Once you cancel a transaction, you can no longer filter on it using the EP Denied Transactions – Filter Options page.

Important! After you click the Process, Manual, or Cancel Pmt buttons, give each process at least 30 seconds to run.

See Also

Chapter 23, “Processing Commitments and Analyzing Giving History,” Settling Gift and Membership Transactions, page 443

Adjusting Self-Service Gift Credit Card Payments

To adjust gift credit card payments, you must open a gift adjustment session and make the necessary changes. However, any time you change credit card information, you must revalidate, reauthorize, and resettle the transaction. You must also credit the original gift amount.

To reauthorize and credit adjusted transactions:

1. Authorize the new gift amount using the EP Transaction Processing – Filter Options page and EP Transaction Processing – Transaction List pages.

2. Filter transactions for a Transaction Requested value of *Credit* on the EP Transaction Processing – Filter Options page.
3. Credit the original gift amount on the EP Transaction Processing – Transaction List page.

See Also

Chapter 22, “Entering Commitments,” Adjusting Gifts, page 399

Chapter 23, “Processing Commitments and Analyzing Giving History,” Selecting Gift and Membership Transactions for Processing, page 440

Chapter 23, “Processing Commitments and Analyzing Giving History,” Settling Gift and Membership Transactions, page 443

Investigating Self-Service Gift and Pledge Transactions

You may need to research the details of a self-service gift or pledge if, for example, an online contributor contacts your organization with questions about their transaction, or if your organization needs to review valid transactions that have not yet been processed. You have can investigate transactions by using either the Self Service Giving Inquiry pages or the EP Transaction Log Inquiry pages.

This section discusses how to:

- Filter self-service gifts.
- View self-service gift information.
- View self-service gift details.
- View self-service gift log details.
- Select self-service gift transactions for review.
- Review self-service gift transactions.

Prerequisites

Before you can search for and view self-service gift transactions, you must make sure that self-service transactions exist in the system.

Pages Used to Investigate Self-Service Gift and Pledge Transactions

Page Name	Object Name	Navigation	Usage
Self Service Giving Inquiry – Filter Options	AV_INV_G_INQ_FLTR	Manage Contributor Relations, Enter Commitments, Inquire2, Self Service Giving	Enter search criteria for self-service gifts or pledges.
Self Service Giving Inquiry – Self Service Giving List	AV_INVLV_G_INQ	Click the Search button on the Self Service Giving Inquiry – Filter Options page.	View the results of your search.
Self Service Giving Inquiry – Self-Service Giving Detail	AV_INV_G_INQ_DTL	Click a Receipt Number link on the Self Service Giving Inquiry – Self Service Giving List page.	View details of a self-service gift or pledge.
Self Service Giving Inquiry – Self-Service Gift Log Detail	AV_INV_G_INQ_LOG	Click a link under the Reference Nbr heading on the Self-Service Gift Inquiry – Self Service Gift List page.	View a summary of each step in the electronic payment process.
EP Transaction Log Inquiry – Filter Options	AV_EP_LOG_FLTR	Manage Contributor Relations, Enter Commitments, Inquire2, EP Transaction Log Inquiry	Enter your selection criteria for the self-service gift transactions to review.
EP Transaction Log Inquiry – Transaction List	AV_EP_TRANS_LOG	Click the Search button on the EP Transaction Log Inquiry – Filter Options page.	View the transactions that meet the criteria you selected on the EP Transaction Log Inquiry – Filter Options page.

Filtering for Self-Service Gifts

Access the Self Service Giving Inquiry – Filter Options page.

Self Service Giving Inquiry

Filter Options

*Institution:

PSUNV

Payment Status:

Processed

Receipt Number:

*Commitment Type:

All

Date Range

From:

11/07/2002

To:

11/07/2002

Amount Range

From:

USD

To:

Search

* Required Field

Self Service Giving Inquiry – Filter Options page

The system populates this page by default to the user's Institution, a Payment Status of *Processed*, the current date, and a Commitment Type of *All*. You can modify these default values and enter any combination of search criteria to research self-service gifts or pledges. Other delivered values for Payment Status are *Authorized*, *Declined*, and *Valid*. Other delivered values for Commitment Type are *Gift* and *Pledge*.

Note. A self-service pledge has a status of *Valid* when submitted by the self-service donor, and a status of *Processed* when the system moves it into a self-service session. The Payment Status values *Authorized* and *Declined* apply only to self-service gifts.

Enter the system-generated Receipt Number to search for a specific gift or pledge. This field is also useful if a donor contacts your institution with a Receipt Number from an online gift or pledge session. To search for multiple gifts or pledges, enter From and To values for Date Range and Amount Range. Click Search to retrieve the results.

The table below more clearly describes each Payment Status on this page.

Payment Status	Description
Valid	Contributor has entered gift online and system has submitted gift to a third-party credit card processor for authorization. (System saves the record when contributor clicks the Submit button.) However, for some internal reason, system receives no response from the third-party processor (for example, because of poor internet connectivity, expired license, business interlink improperly configured, third-party processor system is down).
Authorized	System has authenticated the credit card number and third-party processor has placed a temporary hold on the specified amount against the cardholder's credit card.
Processed	Gifts has been entered online, authorized, and processed by the self-service gift process that creates gift sessions.
Declined	System has generated a decline message after transaction is sent to the third-party payment processor. Note that declined self-service gifts cannot be reprocessed since they were not actually written to the gift table and assigned a gift number and session number.

Viewing Self-Service Gift or Pledge Information

Access the Self Service Giving Inquiry – Self Service Giving List page, which lists all online giving that meets your search criteria. Click the Set Filter Options link to return to the Self Service Giving Inquiry – Filter Options page and change your search criteria. To change your view of the search results on this page, you can Sort By *Amount*, *Date*, or *Type*, in either ascending or descending order.

Click a Receipt Number access the Self-Service Giving Detail page. Click a link under the Reference Nbr (reference number) heading to launch the Self-Service Gift Log Detail page.

Viewing Self-Service Gift or Pledge Details

Access the Self-Service Gift Inquiry – Self-Service Giving Detail page to view summary details about an online gift or pledge.

The details include the Receipt Number the system generated for the gift or pledge and the Institution that received it. In addition, this page displays the ID of the donor and the total Gift Amount. Other details include the name of the Campaign, Appeal, Business Unit, and associated Designation that the donor selected, as well as the Session Nbr and Gift Nbr that the system assigned. If the donation is a pledge, the page displays pledge schedule information generated by the system.

Click the Return button to go back to the Self Service Giving Inquiry – Self Service Gift List page.

Viewing Self-Service Gift Log Details

On the Self-Service Gift Inquiry – Self-Service Gift Log Detail page, click a link under the Payment Status heading to view all data sent between your organization and your third-party credit card payment processor.

This page lists the gift transaction information sent to and from your third-party credit card payment processor. It displays the credit card and personal information the contributor entered, such as Credit Card Type, encrypted Credit Card Number, Expiration Date, cardholder Name and Address information, and Gift Amount. Other system details displayed include the Gift Nbr (number), Reference Number, Business Unit, Session Number, Tender Type, ID, and Payment Status.

The remaining information on this page relates to the information the system sent to, and received from, your third-party credit card payment processor. The Service Provide is the name of your third-party processor. The Credit Card Request ID is a code used during billing, to indicate the request number of the prior authorization of the transaction. Auth DTTM lists the authorization date and time code in vendor format. Return Status lists a three-character result code: 0 means success, 100-199 means declined by the vendor but OK to display to online users, 200-299 means declined by vendor and not OK to display to online users, 300-399 means transmission error. CyberSource generates the Auth Code when the transaction is successfully authorized, and the authorization Date appears to the right. The AVS Code designates that the third-party processor verified the cardholder address. The Credit Card Message fields display response messages from your third-party credit card payment processor.

Click the Return button to go back to the Self Service Giving Inquiry – Self Service Gift Log Detail page.

Selecting Self-Service Gift Transactions for Review

Access the EP Transaction Log Inquiry- Filter Options page to track self-service credit card activity by day, session, business unit, and so on. You may also need to track transactions that are waiting to be sent for third-party processing. PeopleSoft Contributor Relations retains a historical record of all credit card activity that you can filter and review.

EP Transaction Log Inquiry

Filter Options

*Institution:

PSUNV

PeopleSoft University

Business Unit:

Tender Type:

Payment Status:

Search

Item

Transaction Date

From

11/01/2001

To

12/14/2001

Reference Number:

Session Number:

Receipt Number:

000000000155

Gift:

EP Transaction Log Inquiry – Filter Options page

This page is primarily used by PeopleSoft Contributor Relations to research gift transactions entered at your organization. However, you can retrieve self-service transaction details from this page by entering a gift's associated Receipt Number.

See Also

[Chapter 23, “Processing Commitments and Analyzing Giving History,” Understanding Credit Card Processing, page 424](#)

Reviewing Self-Service Gift Transactions

Access the EP Transaction Log Inquiry – Transaction List page.

List tab

Reference Nbr (reference number)	The system populates this field by default with a system-generated reference number used to communicate with the third-party credit card payment processor.
SeqNum (sequence number)	Indicates how many actions the system has taken on a particular reference number.
Payment Status	Indicates the results of each system action.
Credit Card Message 1	Displays the resulting response message from your third-party credit card payment processor.

Detail tab

The Detail tab provides more clarity about each gift credit card payment. For each transaction on the List tab, you view the corresponding Business Unit, Tender type (which for self-service gifts is the organization's assigned tender type value for credit card transactions), Session and Gift Nbr (numbers). The Trans Dt (transaction date) lists the date the transaction was initiated, and the Auth Dt (authorization date) lists the date the transaction was authorized (if applicable). Other fields on this page display the ID of the contributor, the Gift Amt (amount), and the Auth Reply (authorization reply) that the system received from your third-party credit card payment processor.



Displays a single page that contains the combined information from both the List and Detail tabs.



Returns to the EP Transaction Log Inquiry – Transaction List page.

CHAPTER 26

Working With Self-Service Outreach

PeopleSoft Outreach is a self-service application that provides tools and features for two roles within your organization: the development outreach officer and the student recruiting officer. The application was designed to help the outreach officer focus on the prospect, not the process. This chapter provides an overview of each role's functionality and discusses how to:

- Initialize and maintain the My Prospects workset.
- Access Outreach fundraising functionality.
- Manage action plans.
- Manage prospect strategies.
- Manage prospect actions.
- Analyze prospect information.
- Access Outreach recruiting and admissions functionality.
- View prospects.
- View applicants.

See Also

PeopleSoft 8 SP1 Recruiting and Admissions PeopleBook

Understanding Outreach for Fundraising

PeopleSoft Student Administration Solutions and PeopleSoft Contributor Relations Solutions offer self-service applications that are licensed separately. If you have licensed the Outreach application, you can use the self-service pages described here.

See *PeopleSoft 8 SP1 Application Fundamentals for Student Administration and Contributor Relations Solutions PeopleBook*, “Introducing Collaborative Applications”.

For the outreach officer who travels a great deal, PeopleSoft Outreach provides a way to easily manage constituent and prospect data while away from the office. The collaborative application gives users quick access to the information they need to cultivate and communicate with constituents and donor prospects. The application also filters and organizes the information and efficiently presents it on self-service pages.

Typically, outreach officers are assigned a number of constituents to manage through the development life cycle. This life cycle includes identifying constituents, informing them of relevant news about the organization's fundraising efforts, gaining their interest in the organization's mission, involving them in activities, and helping them invest in the organization's future. PeopleSoft Outreach presents tools to analyze prospects and to develop strategies to move these constituents through the development life cycle. The prospects that outreach officers manage are generally in the interested, involved, or ready to invest steps of the life cycle.

PeopleSoft Outreach is comprised of four major processes:

1. My Action Plan.
2. Prospect Strategy.
3. Prospect Actions.
4. Prospect information views for analysis.

PeopleSoft Outreach uses PeopleSoft Contributor Relations workset functionality to build the My Prospects workset through which a user can easily progress. Building a prospect workset creates a smaller subset of the database that contains only those IDs that are relevant to the outreach officer.

Prerequisites for Fundraising Role

The target users of PeopleSoft Outreach include organization employees designated as prospect managers, outreach officers, or other advancement officers who may travel frequently.

Because of the extensive clearance process that exists at many philanthropic organizations, PeopleSoft Outreach strategy and action pages only provide records for those IDs that are actual prospects of the user. These prospects are contained in the user's My Prospects workset created on the AV_WORKSET and AV_WORKSET_MBR records.

Various resource assignment processes within PeopleSoft Contributor Relations manage additions to the My Prospects workset. When a new assignment is made, the system adds the EMPLID or EXT_ORG_ID of the newly assigned prospect to the user's My Prospects workset. Likewise, when an assignment is no longer active, the system removes the EMPLID or EXT_ORG_ID of the prospect from the My Prospects workset. PeopleSoft Outreach contains a workset initialization and maintenance process (AV_WS_MYPROS) that controls additions and removals by regenerating the My Prospects workset each time users run it.

See Also

Chapter 14, "Managing Prospects," page 199

Initializing and Maintaining the My Prospects Workset

To utilize the action and strategy management pages in PeopleSoft Outreach, users need a current My Prospects workset. Your organization can create and maintain this workset by running the AV_WS_MYPROS process as well as by assigning resources within PeopleSoft Contributor Relations.

Page Used to Initialize and Maintain the My Prospects Workset

Page Name	Object Name	Navigation	Usage
Outreach Workset Initialization/Maintenance	AV_RUNCTL_OUTR	Design Student Administration, Define Contributor Relations, Process, Outreach WS Initialization	Run the AV_WS_MYPROS process that generates or regenerates My Prospects worksets for outreach officers.

Running the AV_WS_MYPROS Process

Access the Outreach Workset Initialization/Maintenance page.

When users run this process, the system does the following:

1. Empties the workset tables AV_WORKSET and AV_WORKSET_MBR for the My Prospects workset.
2. Selects records from resource assignment tables based on the following conditions.

Table	Conditions
AV_ASGN_STF_PRP	Include on START_DT < current date and end date > current date
AV_PG_STAFF	Include on START_DT < current date and end date > current date
AV_CNST_ACTN	Include as SLCTR_ID or RSPL_ID and action expiration or complete date +30 days < current date
AV_CNST_AC_ASGN	Include as STAFF_ID and action expiration or complete date +30 days < current date

3. Inserts the selected records into the My Prospects workset on the workset tables AV_WORKSET and AV_WORKSET_MBR for any user that has both a STAFF_ID on the AV_STAFF table and a user ID for access to the system. The process ignores assignments made to someone who is not also a system user. Since staff and volunteers exist in the same AV_STAFF record, volunteers who also have system user IDs have a My Prospects workset built for their user ID.

Use the Process Monitor to review the status of the process. Users can configure Process Scheduler to generate the workset at user-defined intervals.

Note. PeopleSoft recommends that the AV_WS_MYPROS process is scheduled to run nightly, to keep the My Prospects worksets current for all users.

The functionality of Contributor Relations Outreach is fully realized when each prospect has a constituent type assigned.

See Also

[Chapter 13, “Managing Constituent Data,” Assigning Constituent Types, page 168](#)

[Chapter 13, “Managing Constituent Data,” Maintaining Organization Financial Information, page 178](#)

Assigning Resources to the My Prospects Workset

There are several resource assignment pages within PeopleSoft Contributor Relations that enable you to assign a prospect to an outreach officer. Those additions immediately update their My Prospects workset (or create one, if one does not already exist), regardless of whether or not the AV_WS_MYPROS process has been run.

The following table lists all PeopleSoft Contributor Relations pages where you can assign a prospect to an outreach officer, thus updating their My Prospects workset:

CR page/component	Assignment Condition
Resource Assignment component	Any staff or volunteer assignment for a user who also has a system user ID.
Mass Assign Staff page	Any staff or volunteer assignment for a user who also has a system user ID.
Workset Mass Assignments component	Any staff or volunteer assignment for a user who also has a system user ID.
Prospect Action Page	Any user assigned as the responsible person, solicitor, or an assigned resource.
Action Info Page	Any user assigned as the responsible person, solicitor, or an assigned resource.
Mass Actions 1 Page	Any user assigned as the responsible person, solicitor, or an assigned resource.
Mass Actions 2 Page	Any user assigned as the responsible person, solicitor, or an assigned resource.
Workset Mass Actions component	Any user assigned as the responsible person, solicitor, or an assigned resource.
Bequest Detail Page	Assigned bequest internal resources on the AV_PG_STAFF record.
Trust Detail Page	Assigned trust internal resources.

CR page/component	Assignment Condition
Gift Annuity Detail Page	Assigned gift annuity internal resources.
Pooled Income Information Page	Assigned pooled income internal resources.

Note. A deletion from any one of these pages or components only affects the My Prospects workset when the AV_WS_MYPROS process runs.

See Also

Chapter 14, “Managing Prospects,” page 199

Accessing Outreach Fundraising Functionality

This section discusses how to access high-level fundraising functional links.

Page Used to Access Outreach Fundraising Functionality

Page Name	Object Name	Navigation	Usage
Outreach Home Page	AV_OUTREACH_HOME	Outreach, Outreach Officer, Home, Outreach	Access processes often used while away from the office.

Working With the Outreach Home Page

To manage their action plan, users click the Review My Reminders link to access a list of their past due actions, those due today, and upcoming actions. Users click the Manage My Action Plan link to access their entire prospect To Do list.

To manage strategies for their prospects, users click the Add or Update a Strategy link to select a prospect and then enter information on a series of strategy detail pages.

To manage actions for their prospects, users click the Add or Update an Action link to select a prospect and then enter information on a series of action detail pages. Users click the Complete an Action link to access the Prospect Action – Results page. Users click the Complete a Contact Report link to go directly to the Prospect Contact Report page.

Managing An Action Plan

The links under My Action Plan on the Outreach Home page enable outreach officers to review reminders and manage action plans. This section discusses how to:

- Review reminders.

- View assigned actions.

Pages Used to Manage Action Plans

Page Name	Object Name	Navigation	Usage
My Reminders	AV_MYREMINDERS	<ul style="list-style-type: none"> • Click the Review My Reminders link on the Outreach Home page. • Outreach, Outreach Officer, Tasks, My Reminders 	View actions that need immediate or current attention.
My Action Plan	AV_OUTR_TODO_LIST	<ul style="list-style-type: none"> • Click the Manage My Action Plan link on the Outreach Home page. • Outreach, Outreach Officer, Tasks, My Action Plan 	View all actions.

Reviewing Reminders

The My Reminders page appears even if there are no reminders. For reminders to appear, the user's ID must have at least one prospect action assigned to it.

This page displays actions in three categories – Past Due, Due Today, and Upcoming – based on the planned date. The system sorts the reminders to display in alphabetical order. Prospects are constituents that are affected by the action. Users click an Action description to display details on the Prospect Action Summary page, where users can then edit the action. The Action Type describes the type of action required. Action type values are defined on the Action Types page. The Planned Date and Complete Date show when the action is intended to occur and when it actually did occur. The Action Status field lists whether the action is *Scheduled*, *Pending*, *On Hold*, *Completed*, or *Cancelled*. The organization can add additional status values on the Setup Action Status page. Result displays the outcome of the action.

Users enter the Number of Upcoming Days for which to display reminders (based on the planned date). The default display is the current date + 7. To expand or shorten the displayed list, users enter a new value in the Number of Upcoming Days field and click the Refresh button. Users click the Save as Default button to save the value in this field as the new default display period for that user.

Users click the Outreach Home Page link to return to the home page. If they have modified the number of upcoming days value, the system prompts them to save their changes.

Viewing Assigned Actions

The My Action Plan page appears even if there are no action plan items. For items to appear, the user's ID must have at least one prospect action assigned to it.

This page populates with all current (incomplete) actions that are less than or equal to today's date and the value of the Reminder Days field defined on the CR Installation page. To choose a different range of actions, users first must select an Institution, then enter a date range for which they want to display actions. When they click the Refresh button, the page displays actions assigned to the user that meet the institution and date criteria, sorted in alphabetical order by Prospect name. Prospects are constituents that are affected by the action.

Users click an Action description to display details on the Prospect Action Summary page, where users can then edit the action. The Action Type describes the type of action required. Action type values are defined by your organization on the Action Types page. The Planned Date and Complete Date show when the action is intended to occur and when it actually did occur. The Action Status field lists whether the action is *Scheduled*, *Pending*, *On Hold*, *Completed*, or *Cancelled*. The organization can add additional status values on the Setup Action Status page. Result displays the outcome of the action.

Managing Prospect Strategies

This section discusses how to use the Prospect Strategy component to add or update prospect strategies by completing the following tasks:

- Select a prospect name.
- Edit or add a prospect strategy.
- Edit or add prospect strategy details.
- Link a prospect strategy to initiatives.
- Link a prospect strategy to actions.
- View a prospect strategy summary.

Pages Used to Manage Prospect Strategies

Page Name	Object Name	Navigation	Usage
Prospect Strategy – Select a Prospect	AV_OUTR_SRCH	<ul style="list-style-type: none"> Click the Add or Update a Strategy link on the Outreach Home page. Outreach, Outreach Officer, Tasks, Add/Update a Strategy 	Search for and select a prospect strategy record.
Prospect Strategy – Edit Strategy	AV_OUTR_STRT_LIST	Click a prospect name in the Search Results area of the Prospect Strategy – Select a Prospect page.	Select a particular prospect strategy to edit, or to add or delete a strategy for the prospect.
Prospect Strategy – Strategy Detail	AV_OUTR_STRT_DTL	Click a link under the Strategy Name heading or click the Add a Strategy button on the Prospect Strategy – Edit Strategy page.	Enter or update a specific strategy plan for cultivating the prospect.
Prospect Strategy – Linked Initiatives	AV_OUTR_STRT_INIT	Click the Next button on the Prospect Strategy – Strategy Detail page.	Link a prospect strategy to one or more initiatives, if appropriate.
Prospect Strategy – Linked Actions	AV_OUTR_STRT_ACTN	Click the Next button on the Prospect Strategy – Linked Initiatives page.	Link a prospect strategy to one or more actions. Users can also use this page to view linked spouse actions.
Prospect Strategy – Summary	AV_OUTR_STRT_SMRY	Click the Next button on the Prospect Strategy – Linked Actions page.	View and print a prospect strategy summary.

Selecting a Prospect Name

To add or update prospect strategies, outreach officers must first access the Prospect Strategy page, search their prospect workset, and select a prospect name. Once users select a name, they can then add new strategies or edit existing ones on that prospect record.

To search for a prospect, users must select an Institution and then can enter any additional combination of search values. To search for a person, users can enter an EmplID, First or Last Name, or Class Year. To search for an organization, users can enter an Org ID, Org Name, or SIC code. All other fields on the page pertain to both people and organizations: City, State, Country and Cnst Type (constituent type). Valid constituent types are shipped with your system and should not be altered.

Note. The following format restrictions apply to the fields on this page: Class Year must be in CCYY format (Century/Year); City must be initially capitalized and include spaces between words; Org Name must be upper case and exclude spaces between words. In addition, note that the ID fields (Last Name, First Name, and Org Name) convert to upper case when users click the Search button.

When users click the Search button, the results appear at the bottom of the page in alphabetical order. At any point, users can clear their search values.

Note. Search pages for strategies and actions in PeopleSoft Outreach only populate with members of the My Prospects workset.

Editing or Adding a Prospect Strategy

Access the Prospect Strategy – Edit Strategy page.

To edit an existing strategy, users click a link under the Strategy Name heading. If there are no existing strategies for the prospect, or if users want to add a new strategy, they click the Add a Strategy button. Both the link and the button take users to the Prospect Strategy – Strategy Detail page. If users are adding a new strategy, they must enter the strategy detail information on the Prospect Strategy – Strategy Detail page. If users are editing an existing strategy, the system populates the Prospect Strategy – Strategy Detail page with the existing data.

To remove an entire strategy from a prospect's record, users Select the appropriate check box and click the Delete button. A warning message appears, asking users to click the OK button to confirm the deletion or click the Cancel button to return to the Prospect Strategy – Edit Strategy page. Users can delete multiple strategies at once.

Editing or Adding Prospect Strategy Details

Access the Prospect Strategy – Strategy Detail page.

Page Layout

All of the Prospect Strategy pages display the same information at the top of the page: the step of the process, the prospect's name, email address, highest-ranking constituent type, and the name of the assigned prospect manager. Users can click the email address link to launch their email program and send a message to the prospect, then return to this page in the process. For a prospect who is a person, users can access the Constituent Type Summary page, which lists all assigned constituent types for the prospect.

Several buttons appear in the upper right corner of the page.



Assign or view communication records for the prospect.



Assign or view checklists for the prospect.



Add a comment or view a list of all comments about the prospect.



View details about the service restrictions associated with negative service indicators for the prospect.



View details about the positive service indicators for the prospect.

In addition, the navigation buttons on this page apply to all of the Prospect Strategy pages.

Strategy Detail

In this section, users enter or change a strategy name, select its status, and choose whether to link the strategy to the prospect's spouse and manage the prospects as a couple.

Note. The apply strategy to spouse option is only available if a spouse exists for the prospect in the system.

Users can also enter or edit a detailed strategy description using the long free-text description field and mark the date and time of each descriptive entry.

Linking a Prospect Strategy With Initiatives

Access the Prospect Strategy – Link Strategy to Initiatives page.

The instructions on the page lead the user through this optional process of linking an initiative to the strategy, as well as adding a new initiative. Adding a campaign initiative to a prospect's strategy results in the prospect being identified as a prospect for that campaign. Users select an Initiative Type from the available options. In addition to these delivered types, the organization can define more types on the Setup Initiative Types page. After selecting the type, the user enters an Initiative of that type or selects one from the prompt.

Linking a Prospect Strategy With Actions

Access the Prospect Strategy – Linked Actions page.

Outreach officers can use the Prospect Strategy – Linked Actions page to manage specific actions to achieve the strategy. The page instructions lead users through the process of editing any existing actions; users can also click the Add an Action button to link new ones. Any actions previously added and linked to the strategy appear on this page. Users click a link under the Action heading to display the populated Prospect Action – Action Detail page; they click the Add an Action button to display a blank Prospect Action – Action Detail page.

This page also displays any actions that have been added to a spouse's record that are linked to this strategy. Again, users click the Action name link to display the Prospect Action – Action Detail page.

See Also

[Chapter 26, "Working With Self-Service Outreach," Editing or Adding Prospect Action Details, page 559](#)

Viewing a Prospect Strategy Summary

Access the Prospect Strategy – Strategy Summary page.

Users can print the page using their web browser's print functionality (File, Print or CTRL+P). Users can edit any particular section or click the appropriate number in the upper left portion of the page to return to the step that enables them to edit that part of the process.

To return directly to the summary from the edited step, the user can click the last of the numbered circles in the upper left corner of the page.

After viewing the summary information, users must save the transaction if they did not save the strategy in a prior step.

Managing Prospect Actions

This section discusses how to use the Prospect Actions component to add or update prospect actions by completing the following tasks:

- Select a prospect name to manage actions.
- Edit or add a prospect action.
- Edit or add prospect action details.
- (Optional) Edit or add ask information.
- (Optional) Edit or add prospect action description.
- Assign resources to the prospect action.
- Link a prospect action to initiatives.
- View a prospect action summary.
- Select a prospect to complete an action.
- Select an action to complete.
- Complete a prospect action.
- Select a prospect to send a contact report.
- Enter contact report details.
- View a contact report summary.
- Send a contact report.
- Send updated biographic information.

Pages Used to Manage Prospect Actions

Page Name	Object Name	Navigation	Usage
Prospect Action – Select a Prospect	AV_OUTR_SRCH	<ul style="list-style-type: none"> • Click the Add or Update an Action link on the Outreach Home page. • Outreach, Outreach Officer, Tasks, Add/Update an Action 	Search for and select a prospect action record.
Prospect Action – Edit Action	AV_OUTR_ACTN_LIST	Click a name in the Search Results area of the Prospect Action – Select a Prospect page.	Select a particular prospect action to edit or to add actions for the prospect.
Prospect Action – Action Detail	AV_OUTR_ACTN_DTL	Click a link under the Action Description heading or click the Add an Action button on the Prospect Action – Edit Action page.	Enter or update an action step for a prospect that will be carried out by a staff member or volunteer.

Page Name	Object Name	Navigation	Usage
Prospect Action – Ask Information	AV_OUTR_ACTN_ASK	Click the Next button on the Prospect Action – Action Detail page.	Enter details about an action that includes a donation request (ask). If the action type on Prospect Action – Action Detail page is not <i>Ask</i> , users may skip this page.
Prospect Action – Action Description	AV_OUTR_ACTN_DSCR	Click the Next button on the Prospect Action – Ask Information page.	Enter detailed information related to the action. If the action does not require further description, users can skip this page.
Prospect Action – Assigned Resources	AV_OUTR_ACTN_ASGN	Click the Next button on the Prospect Action – Action Description page.	Assign other resources to the action. If desired, users can skip this page.
Prospect Action – Linked Initiatives	AV_OUTR_ACTN_INIT	Click the Next button on the Prospect Action – Assigned Resources page.	Link campaign, event, membership, volunteer, or other initiatives to the action. If desired, users may skip this page.
Prospect Action – Summary	AV_OUTR_ACTN_SMRY	Click the Next button on the Prospect Action – Linked Initiatives page.	View and print a prospect action summary.
Prospect Action Results – Select a Prospect	AV_OUTR_SRCH	<ul style="list-style-type: none"> Click the Complete an Action link on the Outreach Home page. Outreach, Outreach Officer, Tasks, Complete an Action 	Search for and select a prospect record that has an action they want to complete.
Prospect Action – Results – Edit Action	AV_OUTR_RSLT_LIST	Click a name in the Search Results area of the Prospect Action Results – Select a Prospect page.	Select a specific action that they want to complete.
Prospect Action – Results	AV_OUTR_ACTN_RSLT	Click a link under the Action Description heading on the Prospect Action – Results – Edit Action page.	Enter the specific results of a completed action.
Prospect Contact Report – Select a Prospect	AV_OUTR_SRCH	<ul style="list-style-type: none"> Click the Complete a Contact Report link on the Outreach Home page. Outreach, Outreach Officer, Tasks, Complete Contact Report 	Search for and select a prospect record for which they want to complete and send a contact report.
Prospect Contact Report – Detail	AV_OUTR_ACTN_CNCT	Click a name in the Search Results area of the Prospect Contact Report – Select a Prospect page.	Enter constituent contact report details.
Prospect Contact Report – Summary	AV_OUTR_ACTN_CSMRY	Click the Printer Friendly Version link on the Prospect Contact Report – Detail page.	View a printable summary of all information entered on the contact report.

Page Name	Object Name	Navigation	Usage
Send Contact Report	AV_OUTR_CNCT_SEND	Click the Send Report button on the Prospect Contact Report – Detail page.	Email a completed contact report to a list of users.
Send BioDemo Update page	AV_OUTR_BIO_SEND	Click the Send BioDemo Update button on the Prospect Contact Report Detail page.	Email updated biodemo data learned during a prospect contact to the department responsible for updates to Biodemo data.

Selecting a Prospect Name Prior to Managing Prospect Actions

Outreach officers can manage prospect actions by using the three links on the Outreach Home page. Their options are to add or update an action, complete an action, or complete a prospect contact report.

To add or update prospect strategies, outreach officers must first access the Prospect Action page, search their prospect workset, and select a prospect name. Once users select a name, they can then add new strategies or edit existing ones on that prospect record.

See Also

[Chapter 26, “Working With Self-Service Outreach,” Selecting a Prospect Name, page 554](#)

Editing or Adding a Prospect Action

Access the Prospect Action – Edit Action page. This page lists each action associated with the prospect, its status, and its planned completion date.

To edit an existing action, users select an Action Description. If there are no existing actions for the prospect, or if users want to add a new action, they click the Add an Action button. Both the link and the button take users to the Prospect Action – Action Detail page. If users are adding a new action, they must enter the action detail information on the Prospect Action – Action Detail page. If users are editing an existing action, the system populates the Prospect Action – Action Detail page with the existing data.

Editing or Adding Prospect Action Details

Access the Prospect Action – Action Detail page.

Users enter or change an action description and select its status from the available options. Next, users enter an expected completion date for the action as well as a date the action expires if it is not completed. The action no longer displays in the current actions lists on the My Reminders page. It will appear on My Action Plan if the date range entered includes the action date of the expired action. The expected Completion Date displays in grids as the Planned Date. Users also have options to select an action type and method of contact. Available values for Action Type and Method on this page are defined by the organization. To complete the action, users select a responsible person. Once users enter the responsible person’s ID, the responsible person’s name appears to the right of the ID field. Finally, users may select the strategy that this action supports.

Note. The values for the Responsible Person Type field are delivered with the system as translate values. Do not modify these translate values in any way. Any modifications to these values will require a substantial programming effort.

See Also

[Chapter 26, “Working With Self-Service Outreach,” Editing or Adding Prospect Strategy Details, page 555](#)

Editing or Adding Ask Information

Access the Prospect Action – Ask Information page.

If the action type is *Ask*, outreach officers must enter specific ask information on the Prospect Action – Ask Information page. Users enter the monetary range (From and To amounts) that will be requested as a donation. The Type of solicitor for the donation and the Solicitor name are required if the action is an ask. Only resources defined with a role of Solicitor (SOL) display in the Solicitor prompt.

Note. The values for solicitor type are delivered with the system as translate values. Do not modify these translate values in any way. Any modifications to these values will require a substantial programming effort.

Editing or Adding Prospect Action Descriptions

Access the Prospect Action page.

This page contains a 254-character free-form text field in which outreach officers can enter brief details of the action. Users can mark the date and time of each descriptive entry by clicking the Date/Time Stamp button.

Assigning Resources to Prospect Actions

Access the Prospect Action – Assign Others to Action page.

If users want to assign additional resources to the action, they can add them on the Prospect Action – Assigned Resources page. Assigned resources assist the outreach officer in completing the action either by providing information or by actual involvement in the action itself. Roles indicate the assigned resource’s relation to the action; these values are defined by the institution.

To add a resource, users select the resource Type and then enter the ID of the Resource Assigned and the Role.

Note. The values for Resource Assigned types are delivered with the system as translate values. Do not modify these translate values in any way. Any modifications to these values will require a substantial programming effort.

Linking Prospect Actions to Initiatives

Access the Prospect Action – Link Initiatives to Action page.

If outreach officers want to link initiatives to an action, they can add them on the Prospect Action – Linked Initiatives page. Linking a campaign initiative to an action means that the prospect appears on the prospect list for that campaign. To begin, users click the Add an Initiative button. Next, they enter an Initiative Type and Initiative Code. The name of the initiative appears to the right of the code. Initiative type code values are defined by the organization on the Initiative Types page.

Viewing a Prospect Action Summary

Access the Prospect Action – Action Summary page.

Once the outreach officer finishes entering or editing all of the desired action information, the Prospect Action – Summary page appears. Users can print the page using their web browser's print functionality (File, Print or CTRL+P). If users want to edit any particular section, they can return to the step that enables them to edit that part of the process.

To return directly to the summary from the edited step, the user can click the last of the numbered circles in the upper left corner of the page.

When finished viewing the summary information, users must save the transaction if they want to keep it and have not saved on an earlier step.

Selecting a Prospect Name Prior to Completing an Action

To complete prospect actions, outreach officers must first access the Prospect Action - Results page, search their prospect workset, and select a prospect name. Once users select a name, they can then complete actions on a prospect record.

See Also

Chapter 26, "Working With Self-Service Outreach," Selecting a Prospect Name, page 554

Selecting an Action to Complete

Access the Prospect Action – Results – Edit Action page.

This page lists each action associated with the prospect, its Status, and its Planned Date for completion. Outreach officers click a link under the Action Description heading to choose the action they want to complete; the Prospect Action – Results page appears.

Completing a Prospect Action

Access the Prospect Action – Results page. In addition to the usual prospect information at the top of the page, this page also displays the name of the action.

Action Results

Outreach officers select an Action Status; the status defaults to *Complete*. Users also must select a Result Code. The organization may define other values as well.

Next, users enter the Complete Date. This defaults to the current date the first time the page is accessed for an action, but can be overwritten. If the ask resulted in a commitment, enter the Expected Commitment amount, or the monetary amount that you expect to receive from the donor because of this action. The Actual Commitment amount displays the monetary amount the organization did receive because of this action.

Action Results – Pledge

Users can enter the Pledge Nbr (pledge number) for a pledge that resulted from the action. Users click the Details link to view the Pledge Detail page.

Action Gifts

Users can enter the Gift Nbr (gift number) for a gift that was received as a result of the action. Users click the Details link to view the Gift Detail page. To add another gift to the action results, users click the Add a gift button. Users click the Add another Action button to start the process for creating a new action for that prospect.

Upon saving the page, if the user entered a gift number, the Date and Gift Amt (gift amount) appear to the right of the gift number. The process works similarly if a user enters a pledge number. The date and time the action was Last Updated appear at the bottom of the page.

Users can click the Contact Report button to go directly to the Prospect Contact Report page.

See Also

[Chapter 26, “Working With Self-Service Outreach,” Entering Contact Report Details, page 562](#)

Selecting a Prospect Name Prior to Completing a Contact Report

There are two ways in which users can complete a contact report.

- If they are at the end of the process for completing an action, they can click the Contact Report button on the Prospect Action – Results detail page. The button takes users directly to the Prospect Contact Report – Detail page.
- If they are at the beginning of the process for completing a contact report, they must first access the Prospect Contact Report page, search their prospect workset, and select a prospect name. Once users select a name, they can then complete a contact report for that prospect.

See Also

[Chapter 26, “Working With Self-Service Outreach,” Selecting a Prospect Name, page 554](#)

Entering Contact Report Details

Access the Prospect Contact Report page. In addition to the usual prospect information at the top of the page, this page also displays the name of the action.

Contact Report Detail

Outreach officers first enter their Author ID (which defaults to user ID) and the Report Date (which defaults to the current date). Users can view a printer friendly version of the Prospect Contact Report summary page.

The Report field is a long free-form text area where outreach officers can enter any details of the prospect contact, such as what happened as a result of the action or notes about possible further contacts. Users click the Date/Time Stamp button to mark the date and time of each descriptive entry. If users learn new information about a new prospect, they can link other prospects to this contact report using the Link Report to Other Prospects section.

Link Report to Other Prospects

To link the report to a prospect's spouse, click the Link to Spouse button. The spouse ID displays in the ID field. Users can then access the same contact report through either the prospect ID or the spouse ID.

Note. The Link to Spouse button only appears if a spouse exists for the prospect in the system.

To link the report to other prospects, users select an ID Type and enter an ID. The linked prospect's name appears to the right of the ID. ID type values are delivered by the system. To link to more than one prospect, users click the Link another Prospect button. Users can also click the Delete button to unlink any currently linked prospects from the action.

Users click the Save button to save the contact report. The date and time the action was Last Updated appear above the Report field. Users click the Send Report button to access the Send Contact Report page. Users click the Send BioDemo Update button to access the Send BioDemo Update page.

See Also

[Chapter 26, “Working With Self-Service Outreach,” Sending a Contact Report, page 563](#)

[Chapter 26, “Working With Self-Service Outreach,” Sending Updated Biographic Information, page 563](#)

Viewing a Contact Report Summary

Access the Prospect Contact Report – Contact Report Summary page.

Users can review all contact report information online or print the complete contact report page as well, using their web browser's Print functionality (File, Print or CTRL+P).

After printing or viewing, users can return to the Prospect Contact Report – Detail page.

Sending a Contact Report

Access the Send Contact Report page.

Once outreach officers complete a contact report and are ready to distribute it, they can use this page to email it to anyone in the organization. They can define their distribution list by selecting the ID Type of the recipients and enter their institution-defined Distribution ID. A user can also select a *Role* ID Type to send the report to all users with the selected security role. They can also enter any other Email Address List members they want to include in the distribution, separating multiple email addresses with a semicolon. Users are required to either define an ID type and distribution ID or enter an email address to send the contact report. The system sends emails to the email addresses for users as defined in Maintain Security – User Profiles.

The system populates the Email portion of the page with a default Subject description that includes the prospect name and action description. The Email Text field contains the outreach officer's name and the entire contents of the contact report from the Prospect Contact Report Detail page. Users can edit any field and add any discussion text necessary.

When finished, users click the Send button to trigger the workflow that sends the contact report to the defined distribution list. They receive a confirmation message that the email was sent, then click OK or Cancel to return to the Send Contact Report page. If users click Return instead of Send prior to sending, the system cancels the workflow and returns to the Prospect Contact Report Detail page.

Sending Updated Biographic Information

Access the Send BioDemo Update page.

During the course of managing a prospect, outreach officers occasionally learn new biodemo information. This page enables users to distribute this new information to anyone in the organization. They can define their distribution list by selecting the ID Type of the recipients and enter their institution-defined Distribution ID. A user can also select a *Role* ID Type to send the report to all users with the selected security role. They can also enter any other Email Address List members they want to include in the distribution, separating multiple email addresses with a semicolon. Users are required to either define an ID type and distribution ID or enter an email address to send the contact report. The system sends emails to the email addresses for users as defined in Maintain Security – User Profiles.

The system populates the Email portion of the page with a default Subject description that includes the prospect name and ID. The Email Text field begins with the outreach officer's name; users can then enter any updated information associated with the prospect.

When finished, users click Send to trigger the workflow that sends the contact report to the defined distribution list. They receive a confirmation message that the email was sent, then click OK or Cancel to return to the Send Contact Report page. If users click Return instead of Send prior to sending, the system cancels the workflow and returns to the Prospect Contact Report – Detail page.

Analyzing Prospect Information

PeopleSoft Contributor Relations provides a number of pages that outreach officers can use to analyze prospect information. PeopleSoft Outreach offers a menu structure that gathers and delivers an assortment of pages that facilitate an outreach officer's responsibilities. The links within these pages lead to either a run control page for a report or an inquiry page of summarized prospect information. These pages are not limited to the My Prospects workset and may be accessed for any constituent in the system.

This menu contains submenu links to personal information, organizational information, prospect lists and worksets, stewardship details, and PeopleSoft Contributor Relations reports. The following table summarizes these new menu paths and lists all prospect analysis information pages that PeopleSoft Outreach delivers.

Menu Navigation	Prospect Information Page
Outreach, Outreach Officer, View Prsn (person)	Strategy Summary
	Clearance Summary
	Personal Assets
	Ratings Summary
	Philanthropic Interests
	Donor Appreciation Summary

Menu Navigation	Prospect Information Page
	Involvement Summary
	Membership History
	Audience History
	Event History
	Volunteer History
	Relationship Summary
	Giving Profile
	Commitment Summary
	Commitment Register
	Transaction Register
	Giving Club Progress
	Open Pledge Register
	Planned Giving Profile
	Action Summary
	Contact Report Summary
	Communication Summary
	Comment Summary
	Checklist Summary
Outreach, Outreach Officer, View Org (organization)	Strategy Summary

Menu Navigation	Prospect Information Page
	Clearance Summary
	Org Profile
	Ratings Summary
	Philanthropic Interests
	Donor Appreciation Summary
	Involvement Summary
	Membership History
	Employee List
	Audience History
	Relationship Summary
	Giving Profile
	Commitment Summary
	Commitment Register
	Transaction Register
	Open Pledge Register
	Matching Gifts
	Giving Club Progress
	Action Summary
	Contact Report Summary

Menu Navigation	Prospect Information Page
	Communication Summary
	Comment Summary
	Checklist Summary
Outreach, Outreach Officer, View Lists	Campaign Prospects
	Top Donors
	Giving Club Membership
	Involvement Roster
	Profile Compare
Outreach, Outreach Officer, View Other	Campaigns
	Giving Club Details
	Designations
Outreach, Outreach Officer, CR Reports	Bio-Bit Report – Person
	Bio-Bit Report – Organization
	Bio-Bit Report – Workset
	Designation Donors
	Campaign Progress
	Role Assignments

Understanding Outreach for Recruiting and Admissions

For the recruiting officer, Outreach provides a way to view student prospect and applicant information through self-service pages. Recruiting officers can view the prospects and applicants assigned to them by category and region. They can also view prospects and applicants for a specific organization

Recruiting officers use PeopleSoft Outreach to view prospect and applicant information through self-service pages. They can view the prospects and applicants assigned to them by category and region. They can also view prospects and applicants for a specific organization.

Prerequisites for Recruiting and Admissions Role

Before recruiting officers can view prospects and applicants through self-service pages, they must have prospects and applicants assigned to them. Assign a recruiter to a prospect on the Prospect School/Recruiting page or through the Process Recruiters pages. Assign a recruiter to an applicant on the Application School/Recruiting page.

Accessing Outreach Recruiting and Admissions Functionality

This section discusses how to access high-level recruiting and admissions functional links.

Page Used to Access Outreach Recruiting and Admissions Functionality

Page Name	Object Name	Navigation	Usage
Recruiting Home Page	AD_OUTREACH_HOME	Outreach, Recruiting Officer, Home	View prospects and applicants by category, organization, and region.

Viewing Prospects

This section discusses how recruiting officers can view prospects by category, organization, and region.

Pages Used to View Prospects

Page Name	Object Name	Navigation	Usage
Prospects by Category – Select Search Criteria	SS_ADM_PRS_REQ_CAT	<ul style="list-style-type: none"> Outreach, Recruiting Officer, Home, Recruiting, By Category Outreach, Recruiting Officer, Tasks, View Prospects By Category 	Search for prospects by category.
Prospects by Category – Search Results	SS_ADM_PRS_SUM_CAT	Click the Search button on the Prospects by Category – Select Search Criteria page.	View prospect search results. The Program Detail link displays program details for a particular prospect.
Prospect Programs	ADM_PRSPCT_P_SEC	Click the Program Detail link on any one of the prospect search results pages.	View program details for a prospect.
Prospects by Organization – Select Search Criteria	SS_ADM_PRS_REQ_ORG	<ul style="list-style-type: none"> Outreach, Recruiting Officer, Home, Recruiting, By Organization Outreach, Recruiting Officer, Tasks, View Prospects By Organization 	Search for prospects by organization.
Prospects by Organization – Search Results	SS_ADM_PRS_SUM_ORG	Click the Search button on the Prospects by Organization – Select Search Criteria page.	View prospect search results. The Program Detail link displays program details for a particular prospect.
Organization Primary Location	EXT_ORG_LOC	Click the Org Primary Location link on the Prospects by Organization – Search Results page.	View the organization's primary address.
Prospects by Region – Select Search Criteria	SS_ADM_PRS_REQ_REG	<ul style="list-style-type: none"> Outreach, Recruiting Officer, Home, Recruiting, By Region Outreach, Recruiting Officer, Tasks, View Prospects By Region 	Search for prospects by region.
Prospects by Region – Search Results	SS_ADM_PRS_SUM_REG	Click the Search button on the Prospects by Region – Select Search Criteria page.	View prospect search results. The Program Detail link displays program details for a particular prospect.

Using the Prospects by Category – Select Search Criteria Page

To search for prospects by category, recruiting officers select an institution, academic career, and at least one additional criterion, such as admit term, category, group, and responsible level. If the user fails to select an additional criterion, a message appears prompting him or her to do so. The recruiting officer can also select how he or she wants the results sorted. The Prospects by Category – Search Results page displays the search results.

Using the Prospects by Organization – Select Search Criteria Page

To search for prospects by organization, recruiting officers select an organization and at least one additional criterion, such as institution, academic career, admit term, category, group, and responsible level. If the user fails to select an additional criterion, a message appears prompting him or her to do so. The recruiting officer can also select how he or she wants the results sorted. The Prospects by Organization – Search Results page displays the search results.

Using the Prospects by Region – Select Search Criteria Page

To search for prospects by region, recruiting officers select an institution, academic career, and at least one additional criterion, such as recruiting region, admit term, last school attended, and responsible level. If the user fails to select an additional criterion, a message appears prompting him or her to do so. The recruiting officer can also select how he or she wants the results sorted. The Prospects by Region – Search Results page displays the search results.

Viewing Applicants

This section discusses how recruiting officers can view applicants by category, organization, and region.

Pages Used to View Applicants

Page Name	Object Name	Navigation	Usage
Applicants by Category – Select Search Criteria	SS_ADM_APP_REQ_CAT	<ul style="list-style-type: none"> • Outreach, Recruiting Officer, Home, Recruiting, By Category • Outreach, Recruiting Officer, Tasks, View Applicants By Category 	Search for applicants by category.
Applicants by Category – Search Results	SS_ADM_APP_SUM_CAT	Click the Search button on the Applicants by Category – Select Search Criteria page.	View applicant search results. The Program Detail link displays program details for a particular prospect.
Applicants by Category – Program Detail	SS_ADM_APPL_PROG_C	Click the Program Detail link on any one of the applicant search results pages.	View program details for an applicant.
Applicants by Category – Application Status	SS_ADM_APP_ST_CAT	Click the Application Status link on the Applicants by Category – Program Detail page.	View a person's application status.
Applicants by Organization – Select Search Criteria	SS_ADM_APP_REQ_ORG	<ul style="list-style-type: none"> • Outreach, Recruiting Officer, Home, Recruiting, By Organization • Outreach, Recruiting Officer, Tasks, View Applicants By Org 	Search for applicants by organization.
Applicants by Organization – Search Results	SS_ADM_APP_SUM_ORG	Click the Search button on the Applicants by Organization – Select Search Criteria page.	View applicant search results. The Program Detail link displays program details for a particular prospect.
Applicants by Region – Select Search Criteria	SS_ADM_APP_REQ_REG	<ul style="list-style-type: none"> • Outreach, Recruiting Officer, Home, Recruiting, By Region • Outreach, Recruiting Officer, Tasks, View Applicants By Region 	Search for applicants by region.
Applicants by Region – Search Results	SS_ADM_APP_SUM_REG	Click the Search button on the Applicants by Region – Select Search Criteria page.	View applicant search results. The Program Detail link displays program details for a particular prospect.

Using the Applicants by Category – Select Search Criteria Page

To search for applicants by category, recruiting officers select an institution, and academic career and at least one additional criterion, such as admit term, category, group, and responsible level. If the user fails to select an additional criterion, a message appears prompting him or her to do so. The recruiting officer can also select an academic program and program status, and how he or she wants the results sorted. The Applicants by Category – Search Results page displays the search results.

Using the Applicants by Category – Program Detail Page

Recruiting officers can click the Application Status link to view this person's application status information. The Applicants by Category – Application Status page appears.

Using the Applicants by Category – Application Status Page

Recruiting officers can click the link to View outstanding items for this application. If you have licensed the Personal Portfolio collaborative application, the To Do List Summary page appears. If you have not licensed the Personal Portfolio collaborative application, your recruiting officers do not have access to the To Do List Summary page.

See Also

PeopleSoft 8 SP1 Campus Community Fundamentals PeopleBook, "Using PeopleSoft Personal Portfolio Collaborative Application"

Using the Applicants by Organization – Select Search Criteria Page

To search for applicants by organization, recruiting officers select an organization, and at least one additional criterion, such as institution, academic career, academic program, program status, admit term, and admit type. If the user fails to select an additional criterion, a message appears prompting him or her to do so. The recruiting officer can also select how he or she wants the results sorted. The Applicants by Organization – Search Results page displays the search results.

Using the Applicants by Region – Select Search Criteria Page

To search for applicants by region, recruiting officers select an institution and academic career and at least one additional criterion, such as region, admit term, last school attended, and responsible level. Program and program status can also be selected to further narrow your search. If the user fails to select an additional criterion, a message appears prompting him or her to do so. The recruiting officer can also select how he or she wants the results sorted. The Applicants by Region – Search Results page displays the search results.

APPENDIX A

PeopleSoft Contributor Relations Reports

This appendix provides an overview of PeopleSoft Contributor Relations reports and discusses how to:

- View summary tables of all reports.
- View report details and tables accessed.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

See Also

PeopleSoft PeopleTools PeopleBook: Process Scheduler

PeopleSoft Contributor Relations Reports: A to Z

This table lists the PeopleSoft Contributor Relations reports, sorted alphanumerically by report ID. If you need more information about a report, refer to the report details at the end of this appendix.

Report ID and Report Name	Description	Navigation	Run Control Page
AV702 Graduates to Alumni	Lists graduates selected for the process and their constituent types. (Crystal)	Manage Contributor Relations, Manage People, Process, Graduates to Alumni	AV_RUNCTL_CONFR
AV703 Pledge Schedule Aging	Lists past-due pledge amounts by time period and business unit. (Crystal)	Manage Contributor Relations, Enter Commitments, Report, Pledge Schedule Aging	AV_RUNCTL_PLAGE

Report ID and Report Name	Description	Navigation	Run Control Page
AVBIOBIT, AVORGBIO Biographic Profile	Generate standard or customized bio bits and briefs to summarize information about prospects in the system. (Crystal)	<ul style="list-style-type: none"> • Manage Contributor Relations, Manage Prospects, Report, Biographic Profile, Narrative • Manage Contributor Relations, Manage Prospects, Report, Biographic Profile -Org, Narrative • Manage Contributor Relations, Manage Prospects, Report, Biographic Profile -Workset, Narrative 	AV_BIO_BIT_RPT (person), AV_BIO_BIT_RPT_E (org), AV_BIO_BIT_RPT_W (workset)
AVCAMPRO Campaign Progress	Summarizes the progress of a campaign in relation to its goals. The report includes information about the financial goal, current gifts, deferred gifts, and so on. If you choose to include related campaigns in the report, a campaign summary is generated that totals the progress for the campaign and its related campaigns of a lower reporting level together. (SQR)	Manage Contributor Relations, Manage Campaigns, Report, Campaign Progress Report, Campaign Progress Report	AV_RUNCTL_CAMPR
AVDESDNR Designation Donor List	Lists all the donors who have made a commitment to a particular designation that matches the parameters you define on the Designation Donor List report page. (SQR)	<ul style="list-style-type: none"> • Manage Contributor Relations, Analyze Giving History, Report, Designation Donor List, Designation Donor List • Manage Contributor Relations, Enter Commitments, Report, Designation Donor List, Designation Donor List 	AV_RUNCTL_DESDN
AVPCAE, GFTINC, GFTINCII, and GFTINCIV CAE report	Summarizes gift income by following standards created by the Council for the Advancement and Support of Education (CASE) and the Council for the Advancement of Education (CAE). (SQL, Crystal)	Manage Contributor Relations, Enter Commitments, Report, CAE Report, CAE Report	AV_RUNCTL_CAE
AVROLE Role Assignments report	Summarizes information about the prospect assignments for a resource for a particular role. (SQR)	Manage Contributor Relations, Manage Prospects, Report, Role Assignments, Role Assignments	AV_RUNCTL_ROLE

PeopleSoft Contributor Relations Reports: Selected Reports

This section lists common elements and provides detailed information about individual reports, including important fields and tables accessed. The reports are listed alphanumerically by report ID.

AV702 – Graduates To Alumni Report

Running the Graduates To Alumni process generates a Crystal report that lists the criteria entered on the Graduates to Alumni page as well as the query results, sorted by ID. The report also lists each graduate's Name, Degree Conferred Date, and a description of the Constituent Type Action taken by the AV_CONF_ALUM process. Two values can appear: *Insert*, which means the Alumni constituent type was added to the record, or *Already Alumni*, indicating no action was taken for the record. In addition, the report lists the total number of students that met the selection criteria, the number of inserts made to the Constituent Type table for graduates who were not already identified as alumni, and the number of graduates already assigned the Alumni constituent type.

See Also

Chapter 13, “Managing Constituent Data,” Running the Graduates to Alumni Process, page 170

AV703 – Pledge Schedule Aging Report

The Pledge Schedule Aging report provides an overview of all past-due pledges at your institution, sorted by business unit and amount of days past due: 0-30, 31-60, 61-90, 91-180, >180 days. The report lists the following detailed information for each overdue pledge, as well as a total summary page at the end:

- Session Number
- Pledge Number
- Constituent ID/Name
- ID Type/Constituent Type
- Expected Date
- Expected Amount
- Days Past Due

AVBIOBIT, AVORGBIO – Biographic Profile

Your report may include any of the following fields. If you run your institution's standard bio bit or brief report, the report contains the fields selected on the Bio Bit Setup and Bio Brief Setup pages. If you run a customized report, the report contains the fields you selected on the Custom Bio Bit/Brief Setup page.

- Alias Names
- Service Indicators
- Roles
- Address/Telephone
- Personal Data

- Academic Info
- Employment Info
- Giving to the University
- Five Largest Gifts
- Involvement
- Planned Giving
- Assets
- Ratings
- Spouse Info
- Family Info
- Other Relationships
- Organization Relationships
- Legacy Academic Information
- Summary
- Narrative
- Assigned Staff
- Assigned Volunteers
- Assigned Units

See Also

Chapter 14, “Managing Prospects,” Creating a Biographic Profile, page 222

AVCAMPRO – Campaign Progress Report

The Campaign Progress report summarizes the progress of a campaign in relation to its goals. The report includes information about the financial goal, current gifts, deferred gifts, and so on. If you choose to include related campaigns in the report, a campaign summary is generated that totals the progress for the campaign and its related campaigns of a lower reporting level together.

Institution	Displays the name of the institution for which you are viewing campaign progress.
Campaign	Displays the name of the campaign at your institution for which you are viewing progress.
Reporting Level	<p>Displays the level assigned to the campaign for reporting purposes. The highest reporting level possible is 1. Reporting levels are used when assigning related initiatives to a campaign.</p> <p>If you selected the Include Related Campaigns check box on the Campaign Progress Report page, a separate report page is generated for each campaign of a lower reporting level that’s related to the campaign</p>

that you select for this report. In addition, a summary page is generated that rolls up totals for all the related campaigns.

Financial Goal	Displays the overall financial goal of the campaign.
Percent of Goal	Displays the percentage of total commitments divided by the financial goal for the campaign. On the campaign summary page that's generated when related campaigns are included, this percentage includes totals from all campaigns included in the report.
Current Operations to Date	Displays the total amount given to the campaign to designations that are for current operations only. On the campaign summary page that's generated when related campaigns are included, this amount includes totals from all campaigns included in the report.
Capital Projects to Date	Displays the total amount given to the campaign to designations that are for capital projects only. On the campaign summary page that's generated when related campaigns are included, this amount includes totals from all campaigns included in the report.
Endowment to Date	Displays the total amount given to the campaign to designations for endowment only. On the campaign summary page that's generated when related campaigns are included, this amount includes totals from all campaigns included in the report.
Total Commitments to Date	Displays the sum of all outright gifts, gifts-in-kind, pledges, and deferred gifts for this campaign. On the campaign summary page that's generated when related campaigns are included, this amount includes totals from all campaigns included in the report.
Cash/GIKs to Date	Displays the sum of all gifts, payments, and gifts-in-kind received for the campaign to date. On the campaign summary page that's generated when related campaigns are included, this amount includes totals from all campaigns included in the report.
Outright Gifts to Date	Displays the sum of all direct gifts to the campaign excluding outstanding pledges and deferred gifts. On the campaign summary page that's generated when related campaigns are included, this amount includes totals from all campaigns included in the report.
Pledge To Date	Displays the sum of all pledges to the campaign without regard to any received pledge payments. On the campaign summary page that's generated when related campaigns are included, this amount includes totals from all campaigns included in the report.
Pledge Payments To Date	Displays the sum of all payments made toward pledges to the campaign. On the campaign summary page that's generated when related campaigns are included, this amount includes totals from all campaigns included in the report.
Gifts-in-Kind to Date	Displays the sum of all gifts with the type of Gift-in-Kind made to the campaign. On the campaign summary page that's generated when related campaigns are included, this amount includes totals from all campaigns included in the report.

Irrevocable Gifts – Present Value	Displays the sum of all irrevocable deferred gifts made to the campaign as tracked in Manage Prospects. On the campaign summary page that's generated when related campaigns are included, this amount includes totals from all campaigns included in the report.
Irrevocable Gifts – Market Value	Displays the sum of the market value for all irrevocable deferred gifts to the campaign as tracked in Manage Prospects. On the campaign summary page that's generated when related campaigns are included, this amount includes totals from all campaigns included in the report.
Revocable Gifts – Present Value	Displays the sum of all revocable deferred gifts made to the campaign as tracked in Manage Prospects. On the campaign summary page that's generated when related campaigns are included, this amount includes totals from all campaigns included in the report.
Revocable Gifts – Market Value	Displays the sum of the market value for all revocable deferred gifts to the campaign as tracked in Manage Prospects. On the campaign summary page that's generated when related campaigns are included, this amount includes totals from all campaigns included in the report.
Nbr Donors (number of donors)	Displays the count of donors to the campaign to date. On the campaign summary page that's generated when related campaigns are included, this amount includes totals from all campaigns included in the report. However, it only includes distinct values, so a donor is only included in the count once.
Nbr New Donors (number of new donors)	Displays the count of new donors, or donors making their first commitment to the institution, to the campaign to date. On the campaign summary page that's generated when related campaigns are included, this amount includes totals from all campaigns included in the report. However, it only includes distinct values, so a donor is only included in the count once.
Nbr Volunteers (number of volunteers)	Displays the count of volunteers that have been linked to the campaign through an action or direct assignment to a campaign activity. On the campaign summary page that's generated when related campaigns are included, this amount includes totals from all campaigns included in the report. However, it only includes distinct values, so a volunteer is only included in the count once.
Nbr Prospects (number of prospects)	Displays the count of prospects that have been linked to the campaign through a prospect strategy or actions. On the campaign summary page that's generated when related campaigns are included, this amount includes totals from all campaigns included in the report. However, it only includes distinct values, so a prospect is only included in the count once.
Nbr Open Asks (number of open asks)	Displays the count of actions from Prospect Manager that are scheduled asks related to the campaign and have not been completed. On the campaign summary page that's generated when related campaigns are included, this amount includes totals from all campaigns included in the report.
Amt Open Asks (amount of open asks)	Displays the total amount of asks related to the open asks for this campaign. If an amount range exists, it includes the beginning amount of the range. On the campaign summary page that's generated when related campaigns are included, this amount includes totals from all campaigns included in the report.

Nbr Declined Asks (number of declined asks)	Displays the count of actions from Prospect Manager that included asks related to the campaign and were declined. On the campaign summary page that's generated when related campaigns are included, this amount includes totals from all campaigns included in the report.
Amt Declined Asks (amount of declined asks)	Displays the total amount of asks related to the campaign that were declined. If an amount range exists, it includes the beginning amount in the range. On the campaign summary page that's generated when related campaigns are included, this amount includes totals from all campaigns included in the report.

When you run this report, the system creates a file named `sqr.txt` in your `C:\temp` directory. This file contains information about the parameters that you defined for the report, including the name of each related campaign included in the report if you choose to include related campaigns.

PeopleSoft recommends that you print this file and save it with each report so that you can retain information about the parameters used to generate the report.

See Also

Chapter 17, "Managing Campaigns," Generating the Campaign Progress Report, page 308

AVDESDNR – Designation Donor Report

The Designation Donor report lists all posted commitments made to a particular designation that match the parameters you define on the Designation Donor List report page.

Business Unit	Displays the name of the business unit for which you are viewing commitments to a designation.
Designation	Displays the name of the fund at your institution for which you are viewing commitments. Designations are defined using the Designation Funds component.
Constituent Name	Displays the name of each constituent who has made a commitment to the designation within the parameters you defined for the report.
ID	Displays the ID of each constituent who has made a commitment to the designation within the parameters you defined for the report.
Cnst Type (constituent type)	Displays the constituent type with the highest priority, at the time the commitment was made, for each donor who has made a commitment to the designation within the parameters you defined for the report.
Commitment Amount	Displays the total monetary amount of gifts and pledge payments the donor has made and fulfilled to your institution for this designation.
Pledge Balance	Displays the total monetary amount of pledges the donor has made outstanding to your institution for this designation.
Group Count	Displays the total number of rows for organizations or the total number of rows for individuals contained in the report.

SubTotal Commit Amt (subtotal commitment amount)	Displays the total monetary amount of gifts and pledge payments made by organizations or by individuals that match your report parameters, depending on which grouping of the report you are reviewing. These fields are added together to create the total commitment amount.
SubTotal Pledge Bal (subtotal pledge balance)	Displays the total monetary amount of outstanding pledge balances made by organizations or by individuals that match your report parameters, depending on which group of the report you are viewing. These fields are added together to create the total pledge balance.
Total Count	Displays the total number of rows contained in the report. Each donor to the designation is listed in a row of the report.
Total Commitment Amt	Displays the sum of the subtotal commitment amount fields in the report.
Total Pledge Balance	Displays the sum of the subtotal pledge balance fields in the report.

See Also

Chapter 23, “Processing Commitments and Analyzing Giving History.” Generating Designation Donor Reports, page 501

AVPCAE, GFTINC, GFTINCII, GFTINCIV – CAE Gift Income Report

This report was designed to comply with the standards created by CASE and CAE. It lists the amounts of your outright gifts and deferred gifts by constituent type; it also lists the number of donors and the total donation amounts by constituent type.

Note. The report sorts gifts by the donor’s constituent type at the time the gift was made.

The Individual constituent types listed below appear in Parts I, II, and III of the report.

Alumni	(Column A) Former students who have earned some credit toward one of the degrees or diplomas at your institution (Constituent Type = 1, 2, 3).
Parents	(Column B) People, other than those who can be classified as Alumni, who are parents or guardians of current or former members of your institution (Constituent Type = 4).
Other	(Column D) People who cannot be classified as Alumni, Students, or Parents (Constituent Type = 5, 6, 7, 8, 9).

The Organization constituent types listed below appear in Parts I and II of the report.

Foundations	(Column E) Personal and family foundations, as well as other foundations and trusts that are private, tax-exempt entities operated exclusively for charitable purposes (Constituent Type = 12, 13).
Corporations and Businesses	(Column F) Corporations, partnerships, and cooperatives organized for profit-making purposes. This category includes corporations owned by individuals and families, company-sponsored foundations, and industry trade associations (Constituent Type = 10, 11).

Religious Organizations	(Column G) Churches, synagogues, temples, and their service groups (Constituent Type = 16).
Fund-Raising Consortia	(Column H) Entities formed by a group of cooperating institutions or organizations for the purpose of fund-raising activities (Constituent Type = 14).
Other	(Column I) Organizations that cannot be classified as Foundations, Corporations and Businesses, Religious Organizations, or Fund-Raising Consortia (Constituent Type = 15, 19). This category excludes governmental agencies.

Part I: Outright Gifts for Current Operations displays both unrestricted and restricted gifts. This section only includes hard credit gifts.

- Unrestricted gifts (Part I, Line A) are outright gifts donated without any restrictions on their designation. Matching gifts from organizations are considered unrestricted, unless the organization states otherwise.
- Restricted gifts (Part I, Line B) are outright gifts donated for a specific use. The report lists these specific uses in Lines B1 through B9.

Part II: Outright Gifts for Capital Purposes displays outright gifts for purposes such as property, buildings, equipment, endowments, and student loan funds. Endowment gifts included in this section can be either restricted or unrestricted. This section only includes hard credit gifts.

Part III: Deferred Gifts displays realized deferred gifts received during the reporting period and tracked through Gift Entry. The processes that create the CAE report do not calculate present values for deferred gifts.

Part IV: Other Program Data lists supplementary information about your fund-raising program. Whereas Parts I, II, and III report donation amounts and destinations, Part IV provides a distinct count of donors. This section only reports on hard credit gifts.

Important! Constituent records that include a date of death or that do not have an active address are excluded from the counts in this part of the CAE report.

There are five sections in Part IV:

1. Gifts from Individuals.

Gifts from Individuals lists gifts for all purposes, by constituent type. For Part A of this section (I, A1a-c), alumni types are retrieved from the AV_RCG_DES table. For Part B (I, B1a-c), alumni types are retrieved from the AV_CLASS_YR table. The alumni counts in Part B represent a donor's constituent type during the first contact with your institution.

Comparing Part A and Part B values enables you to calculate a percentage of support for your institution.

For Part G, PeopleSoft Contributor Relations does not calculate present value of deferred gifts.

2. Gifts from Organizations.

3. Other Fund-Raising and Related Data.

Outstanding pledges are included here, though they are not counted in gift totals in Parts I and II of this report.

4. Testamentary Commitments.

Bequest intention information is included here, though it is not counted in gift totals in Parts I, II, or III of this report. The information in this section comes from Planned Giving. The system uses information on the Bequests page to calculate a present value for this section.

5. Other Institutional Data.

PeopleSoft Contributor Relations is not connected to the Endowment Tracking or Budget Expenditures systems. You must manually enter values for this section.

See Also

[Chapter 23, “Processing Commitments and Analyzing Giving History,” Generating CAE Reports, page 483](#)

AVROLE – Role Assignments

The Role Assignments report summarizes information about the prospect assignments for a resource for a particular role. You can run either a summary or detailed report. A summary report produces a one-page report that includes the ID and name of the assigned resource and the number of assignments he or she has that meet the parameters that you set for the report. A detail report produces the summary page and a separate page for each resource that includes the ID and name of each prospect assigned, the associated campaign, start date, end date, and whether the spouse’s record is linked.

The Summary Page is generated each time that you run the report, regardless of whether you select a Report Type of *Summary* or *Detail* on the Role Assignments report page.

Institution	Displays the name of the institution for which you are viewing assignments by role.
Role	Displays the role for which you are viewing resource assignments. Roles are the part the resource assumes in the cultivation process such as <i>Prospect Manager</i> , <i>Campaign Manager</i> , and so on.
Sort Order/Sort By	Indicates whether you are viewing assignments in ascending or descending order by count, ID, or name.
Staff ID, Volunteer ID, Unit Code	Displays the ID of the resource with assignments that fall within the parameters that you set for this report. The label for this column changes depending on the assigned resource type that you select on the Role Assignments report page.
Name	Displays the name of the resource with assignments that fall within the parameters that you set for this report.
Number of Assignments	Displays the number of assignments for this resource that fall within the parameters that you set for this report.

Note. If a prospect has a spouse and you chose to link their records when creating the resource assignment, the couple counts as only one assignment in the total count displayed here.

The Detail pages are generated only when you select a report type of *Detail* on the Role Assignments report page.

Staff ID, Volunteer ID, Unit Code	Displays the ID of the resource with assignments that fall within the parameters that you set for this report. The label for this column changes depending on the assigned resource type that you select on the Role Assignments report page.
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Assigned Prospect	Displays the name of the prospect assigned to the resource for an assignment that matches the parameters defined for the report.
Prospect ID	Displays the ID of the prospect assigned to the resource for an assignment that matches the parameters defined for the report.
Campaign	Displays the campaign code and description for the campaign associated with this resource assignment. You select a campaign when you create the resource assignment.
Sps Link (spouse link)	Indicates whether a spouse's record has been linked to this resource assignment. If so, the assignment for both the prospect and his or her spouse counts as a single assignment in the Number of Assignments column on the summary page of this report.

When you run this report, the system creates a file named `sqr.log` in your temporary directory. This file contains information about the parameters that you defined for the report.

PeopleSoft recommends that you print this file and save it with each report so that you can retain information about the parameters used to generate the report.

See Also

Chapter 14, "Managing Prospects," Generating the Role Assignments Report, page 209

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
account	You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting entry	A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery method it may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure

	from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
application agent	An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attachment	In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.
background process	In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called system-maintained account.
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, Introduction to Microsoft Word. A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods.
category	In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
child	In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
corporate account	Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.

data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	<p>Data elements, at their simplest level, define a subset of data and the rules by which to group them.</p> <p>For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.</p>
data row	Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.
data validation	In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.
DAT file	This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.
delivery method	In PeopleSoft Enterprise Learning Management, identifies a learning activity's delivery method type. An activity can have one or more delivery methods.
delivery method type	In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.
distribution	The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.
double byte character	If you're working with Japanese or other Asian employees, you can enter the employee's name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].
dynamic tree	A tree that takes its detail values directly from a table in the database, rather than from a range of values entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM job	Abbreviation for <i>Enterprise Incentive Management job</i> . In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organization's compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
equipment	In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

event	Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, <i>event</i> also refers to incidents that affect benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
external system	In PeopleSoft, any system that is not directly compiled with PeopleTools servers.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
filter	In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
homepage	Users can personalize the homepage, or the page that first appears when they access the portal.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
key	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.
learning activity	See <i>activity</i> .
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.
learning plan	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

level	A section of a tree that organizes groups of nodes.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	The feature that initiates a process to automatically load information into a PeopleSoft application for example, populating the PeopleSoft Benefits database with plan-level election information.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location indicated by a <i>1</i> is the address you use most often and may be different from the main address.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
material	In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.
message definition	An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.
meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
objective	In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.
override	In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.
pagelet	Each block of content on the homepage is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

parent node	A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>participant object</i> .
payout	In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an RDBMS, an application server, a Web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
per seat cost	In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context. If three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan section	In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that

	defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
private view	A user-defined view that is available only to the user who created it.
process	See <i>Batch Processes</i> .
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as an SQR, a COBOL program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record definition	A logical grouping of data elements.
record field	A field within a record definition.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to

	automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
results management process	In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
routing	Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takes email message, electronic form, or worklist entry.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
self-service application	Self-service refers to PeopleSoft applications that are accessed by end users with a browser.
session	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise

	Learning Management activity characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
sibling	A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
SQR	See <i>Structured Query Report (SQR)</i> .
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
Structured Query Report (SQR)	A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.

table	The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).
TableSet sharing	Specifies control table data for each business unit so that redundancy is eliminated.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a Web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction loading process	In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and picked up by a different section for further processing.
transaction type	In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
uniform resource locator (URL)	In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: <code>http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k</code>
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to

providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

URL

See *uniform resource locator (URL)*.

user interaction object

In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable

In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

warehouse

A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

worksheet

A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

workflow

The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

worklist

The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

zero-rated VAT

Abbreviation for *zero-rated value-added tax*. A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged.

Index

A

- Account Details page 487
- Accounting Entry Definition page 127
- Accounting Line page 450, 517
- accounting lines
 - viewing 449
- Acknowledge Suspense page 463
- Acknowledgement Detail page 463–464
- acknowledgement letters
 - generating 462
 - preparing for 128
- Acknowledgement List page 463, 466
- acknowledgement process
 - letters 461
 - managing 458
 - understanding 459
 - understanding spousal relationships 460
- Acknowledgement Setup1 page 130
- Acknowledgement Setup2 page 130–131
- Acknowledgement Setup3 page 130–131
- acknowledgements
 - defining rules 129
 - managing joint communications 467
 - manually generating 463
 - processing 461
 - processing automatically 462
 - setting up 13
 - transferring 466
 - viewing details 464
 - viewing lists 466
- Action Contact Type page 57, 62
- Action Detail page 227, 242, 291
- Action Filter page 226, 240
- Action Info page 225, 233, 288–289
- Action Results page 58, 63, 225, 234
- Action Status Codes page 58
- Action Status page 63
- Action Summary page 227, 242
- Action Types page 56, 61
- actions
 - completing 234
 - creating 287
 - creating individual 231
 - creating mass 229
 - defining action results 63
 - defining contact types 62
 - defining status codes 63
 - defining types 61
 - entering information about 233
 - filtering 240
 - viewing a summary 290
 - viewing contact reports 243
 - viewing existing 242
 - writing a contact report 235
- additional documentation xxviii
- Address Detail page 48
- Address Inquiry page 166
- addresses
 - entering electronic 167
 - entering for organizations 177
 - entering for people 166
 - managing for people 166
 - updating linked 167
 - viewing data for people 167
- Addresses page 165, 167
- Adjustment Reasons page 124
- Annual Goals page 303–304, 325–326
- Appeal Detail page 83–84
- Appeal page 82–83
- Appeal Types page 81, 83
- appeals
 - defining campaign linked appeals 156
 - defining for the web 151
 - setting up 80
- Applicants by Category – Application Status page 571–572
- Applicants by Category – Program Detail page 571–572
- Applicants by Category – Search Results page 571
- Applicants by Category – Select Search Criteria page 571–572
- Applicants by Organization – Search Results page 571
- Applicants by Organization – Select Search Criteria page 571–572
- Applicants by Region – Search Results page 571

- Applicants by Region – Select Search
 - Criteria page 571–572
- application fundamentals xxvii, xxxiii
- appreciation items
 - defining 64
 - maintaining 237
 - viewing a list of items given 238
- Area of Responsibility page 101–102
- Ask Detail page 227
- asset types
 - defining 59
- assets
 - maintaining personal 219
 - viewing personal 220
- Assets page 56, 59
- Assignment Detail page 202
- Assignment Type page 101–102
- Attribute Type page 72
- Audience Criteria page 72, 74
- Audience Detail page 274
- Audience History page 191, 358
- Audience page 274, 276
- audiences
 - defining for initiatives 71
 - defining the audience 276
 - viewing a constituent's audience history 191

B

- Batch Programs page 508–509
- Batch Publish page 515
- Batch Publish Rules page 508
- Benefits History page 348
- Bequest Detail 2 page 250–251, 265
- Bequest Detail page 250, 265
- Bequest Information page 250, 252
- bequests
 - tracking 249
- Bio Bit Setup page 11, 13
- bio bit/briefs
 - creating 222
 - setting up custom 9
- Bio Brief Setup page 11, 13
- Bio/Demo Data page 165
- biographic narrative
 - creating 218
- biographic profile 186
- Biographic Profile page 218, 222
- Biographic Profile report 575
- Budget Detail page 285–286

- Budget page 285
- Budget Period page 125
- Budget Table page 80
- budgets
 - creating 284
 - defining categories 79
- business processes 1
- Business Unit CR page 17, 142, 145
- business units
 - and commitment entry 23
 - and the membership process 23
 - associating with merchants 145
 - creating 17
 - defining and securing 15
 - defining functional group components 20
 - implementing functional group security 19
 - understanding 16

C

- CAE report 580
 - generating 483
- CAE Report page 483
- Campaign page 271
- Campaign Progress report 576
- Campaign Progress Report page 308
- Campaign Summary page 310
- campaigns
 - defining for the web 153
 - generating a progress report 308
 - managing 301
 - setting initiative goals 303
 - setting up 87
 - setting up an anticipated gift table 89
 - setting up reporting rules 91
 - setup prerequisites 87
 - understanding management 301
 - understanding setup 87
 - viewing a prospect list 307
 - viewing an initiative summary 310
 - viewing top donors 309
- clearance
 - prospect 228
 - viewing 239
- Clearance page 224, 226, 228, 239
- comments, submitting xxxi
- commitment profile 188
- Commitment Register Filter page 487, 497

- Commitment Register page 488, 497
- commitment summary
 - self-service 532
- Commitment Summary Details page 487, 496
- Commitment Summary page 487, 495, 532
- commitments
 - defining adjustment reasons 124
 - defining designation funds 119
 - defining designation types 117
 - defining matching gift types for designations 118
 - defining recognition types 123
 - defining tender types 116
 - entering 371
 - processing 423
 - setting up management 113
 - setup prerequisites 113
- common elements xxxi
- Component Function page 17, 20
- Component Search Record Settings page 21
- Component Search Records page 17
- Cond Pledge Designations page 405–406
- Cond Pledge Entry page 405
- Cond Pledge Recognition page 405, 408
- conditional pledges
 - assigning designations 406
 - assigning recognition 408
 - entering 404
 - entering details 405
 - understanding 404
- Consolidated Publications Incorporated (CPI) xxviii
- constituent accumulators
 - understanng 431
- Constituent Accumulators page 433, 435
- constituent data
 - managing 159
 - prerequisites to setting up 41
 - setting up 41
- Constituent Type page 168
- Constituent Type Summary page 168
- constituent types
 - adding to graduates 170
 - assigning 168
 - defining 42
 - maintaining 168
 - understanding 42, 168
- constituents
 - updating and adding 391
- contact information xxxi
- contact report
 - using Outreach to complete 562
- Contact Report Detail page 227, 244
- Contact Report page 225, 235
- Contact Report Summary page 227, 243
- contact reports
 - determining whether required 6
 - viewing 243
 - writing 235
- contact types
 - setting up 53
- Contributor Relations
 - completing installation 3
 - setting up framework 3
- country-specific documentation xxx
- CR Business Unit Security page 17, 22
- CR Installation page 3, 508
- CR Merchants page 142, 144
- CR Search page 160–161
- CR Search Result page 161–162
- Credit Card Type page 142
- credit cards
 - accessing payment pages 424
 - adjusting gift and membership payments 402
 - adjusting self-service gift payments 540
 - authorizing and settling denied transactions 446
 - authorizing and settling transactions as a single process 444
 - authorizing transactions 441
 - defining connection parameters for third-party processor 144
 - defining payment methods 142
 - defining types 142
 - investigating self-service gift transactions 541
 - managing self-service transactions 521
 - processing self-service transactions 535
 - processing transactions 436
 - reviewing transaction activity 447
 - reviewing transactions 448
 - selecting denied transactions for processing 445
 - selecting transactions for processing 440
 - selecting transactions for review 447

- setting up processing 141
- setting up third-party processor connection 142
- settling transactions 443
- understanding denied transactions 444
- understanding processing 424
- understanding transaction processing 436
- working with denied self-service transactions 538
- working with denied transactions 444
- Criteria and Defaults page 297–298
- cross-references xxx
- Custom Bio Bit/Brief Setup page 7, 9
- Customer Connection Website xxviii
- CyberSource 142, 535

D

- Defaults page 128
- Define Constituent Types page 43
- Define Staff page 30
- Define Volunteers page 30
- degrees
 - adding external 173
 - adding internal legacy 175
 - maintaining information 171
- Department Goals page 303, 306
- Designation Adjust page 340, 342
- Designation Detail page 397, 489
- Designation Donor List page 502
- Designation Donor report 579
- Designation Funds 2 page 119, 121
- Designation Funds Detail page 489, 501
- Designation Funds page 119
- Designation Types page 117
- designations
 - assigning conditional pledges 406
 - defining campaign linked designations 155
 - defining for the web 150
 - defining funds 119
 - defining types 117
 - reporting by donor 501
 - viewing fund details 501
- Designations page 330, 337
- Display In Other Currency page 216
- documentation
 - country-specific xxx
 - printed xxviii
 - related xxviii

- updates xxviii
- Donations – Campaigns page 526, 529–530
- Donations – Choose Organization page 526
- Donations – Ways to Give page 530
- Donor Appreciation Detail page 226, 238
- Donor Appreciation Items page 59, 64
- Donor Appreciation page 226, 237
- Donor Appreciation Summary page 226, 238
- Donor Phase Table page 88
- donors
 - adding and updating records 191
 - viewing top summaries 310

E

- electronic addresses, *See* addresses, entering electronic
- Electronic Addresses page 166
- email addresses, *See* addresses, entering electronic
- Email/URL page 177
- employee list
 - viewing 181
- Employee List page 181
- Employment History Detail page 177
- EP Denied Transactions – Filter Options page 445, 539
- EP Denied Transactions – Transaction List page 445–446, 539–540
- EP Transaction Log Inquiry – Filter Options page 447
- EP Transaction Log Inquiry – Filter Options page 542, 544
- EP Transaction Log Inquiry – Transaction List page 447–448
- EP Transaction Log Inquiry – Transaction List page 542, 545
- EP Transaction Processing – Filter Options page 440, 443, 536
- EP Transaction Processing – Transaction List page 440–441, 536–537
- Event Goals page 363
- event initiatives
 - managing 361
 - setting up 109
 - understanding management 361
 - understanding setup 109
- Event page 271

- event types
 - setting up 110
- events
 - assigning meeting details 364
 - creating 364
 - creating templates 365
 - reviewing events, meetings, and attendees 365
 - setting intermediate goals 362
 - setup prerequisites 109
 - tracking attendance 364
- expenses
 - tracking 284
- Ext Org Matching Gift page 471–472, 475
- External Degrees page 172–173
- external system IDs
 - tracking 167

F

- Financials 8.4 interface 505
 - messaging 506
 - monitoring messages 516
 - publishing accounting lines
 - automatically 512
 - publishing accounting lines
 - manually 514
 - setting up business unit
 - synchronization 510
 - setting up integration 507
 - synchronizing business units with PeopleSoft Financials 511
 - troubleshooting 517
 - understanding 505
 - viewing accounting lines 517
- Financials version
 - identifying 6
- Fiscal Year Details page 532
- Full Data Publish page 508, 511
- Full Table Publish Rules page 508, 510
- Functional Group Security page 17, 19
- Fund Information page 526, 528, 530

G

- general functions
 - using 35
- getting started 1
- Gift Adjust page 400
- gift and pledge process

- understanding 371
- gift annuities
 - tracking 258
- Gift Annuity Account Info page 265
- Gift Annuity Beneficiaries page 258, 260, 265
- Gift Annuity Detail page 265
- Gift Annuity Details page 258
- Gift Annuity Information page 258, 260
- Gift Detail page 397, 399
- Gift Entry page 381
- Gift Income report 580
- Gift Summary page 397–398
- gift table
 - example 90
 - setting up 89
- Gift Table page 89
- Gift Types page 115
- gifts
 - adjusting 399
 - adjusting credit card payments 402
 - authorizing and settling credit card transactions as a single process 444
 - authorizing and settling denied credit card transactions 446
 - authorizing credit card transactions 441
 - defining types 114
 - entering 381
 - entering an adjustment transaction 400
 - entering check information 335
 - entering check or credit card information 386
 - entering commitments 371
 - entering credit card information 335
 - entering payments 379
 - entering tribute notification 388
 - identifying potential matching gifts 389
 - loading mass transactions 394
 - reviewing credit card transactions 448
 - selecting credit card transactions for processing 440
 - selecting credit card transactions for review 447
 - selecting denied credit card transactions 445
 - settling credit card transactions 443
 - understanding adjustment 399
 - understanding payments 380
 - viewing a summary 398

- viewing a supervisor's session
 - summary 399
- viewing details 399
- viewing session transactions 396
- Giving Club Detail page 478
- Giving Club Level Detail page 478
- Giving Club Levels page 138, 140, 479
- Giving Club Membership page 477, 479
- Giving Club Membership Summary
 - page 479, 482
- giving club progress
 - self-service 533
- Giving Club Progress page 478, 481, 533
- Giving Club Rules page 138
- Giving Club Summary page 478, 482
- giving clubs
 - automatically processing
 - membership 480
 - defining 138
 - defining information 138
 - defining levels 140
 - managing 476
 - manually generating membership 479
 - tracking a donor's progress 481
 - understanding 477
 - viewing a membership summary 482
 - viewing a summary 482
- giving history
 - analyzing 423, 484
 - comparing profiles 500
 - viewing a commitment register 497
 - viewing a commitment summary 495
 - viewing a donor profile 490
 - viewing a transaction register 498
 - viewing an organization profile 492
 - viewing commitment summary
 - details 496
- Giving Profile Org – Giving Profile
 - page 486
- Giving Profile page 486, 490, 492
- giving vehicles
 - defining 157
- Giving Vehicles page 147, 157
- GL interface
 - interfacing with PeopleSoft Financials
 - 8.4 505
 - running file extract 435
 - understanding 430
- GL Interface File Extract page 433, 435
- GL Interface page 126, 433, 513, 515

- glossary 585
- Goal Types page 76
- Graduates to Alumni page 170
- Graduates to Alumni report 575

I

- implementation 2
- Information page 265
- Initial Setup page 126
- Initiative Action page 288
- Initiative Action Summary page 291
- Initiative Audience Build page 275, 277
- Initiative Audience Merge page 275, 278
- Initiative Detail page 227, 310–311
- Initiative Goals page 303–304, 325
- Initiative Types page 70
- initiatives
 - assigning initiative resources 280
 - assigning related initiatives 279
 - assigning resources 280
 - building the audience 277
 - creating 271
 - creating actions 287
 - defining 270
 - defining a public relations plan 283
 - defining an audience 273
 - defining audiences 71
 - defining budget categories 79
 - defining communication methods 77
 - defining donor phases 88
 - defining goal types 76
 - defining the audience 276
 - defining types 69
 - linking related initiatives 278
 - management prerequisites 270
 - managing 269
 - managing other 367
 - preparing for letters 362
 - setting up 67
 - setting up appeals 80
 - setup prerequisites 67
 - understanding management 269
 - understanding mass change
 - template 294
 - understanding setup 67
 - viewing action summaries 290
 - viewing related goals 292
- institution defaults
 - setting up 10
- Institution Installation 2 page 11, 13

Institution Installation page 11
 institution table security
 setting up 14
 Institution Table Security page 15
 Internal Degrees page 172
 Internal Legacy Degrees page 172–173, 175
 involvement
 adding records 195
 creating a roster 196
 defining categories 44
 defining giving vehicles 157
 defining settings 147
 defining types 45
 filtering and viewing records 196
 Involvement
 accessing 523
 defining campaign linked appeals 156
 defining campaign linked designations 155
 defining web appeals 151
 defining web campaigns 153
 defining web designations 150
 giving online 524
 maintaining information 192
 managing credit card transactions 521
 setting up online giving 146
 setting up online pledges 146
 understanding 192, 521
 Involvement Categories page 44
 involvement codes
 defining 46
 understanding 46
 Involvement Codes page 47
 Involvement Detail page 194
 Involvement Filter page 193, 196
 Involvement home page 523, 530
 Involvement page 193, 195
 Involvement Setup – Campaign Linked Appeals page 147, 156
 Involvement Setup – Campaign Linked Designations page 147, 155
 Involvement Setup page 147, 529
 Involvement Summary page 194
 Involvement Types page 45
 item types
 setting up 125

J

Join Worksets page 37–38

joint communications
 managing 467
 journals
 defining a source 128
 defining journal generator template defaults 128

L

last record numbers
 setting 6
 Leadership Types page 101, 103
 Linked Actions page 212, 214

M

Mail In Donation Form page 526, 529
 Mail-in Donation Form page 530
 Maintain Sessions page 374
 Make a Donation – Confirm and Submit page 526, 528, 530
 Make a Donation – Gift Information page 526–527
 Make a Donation – Payment Information page 526, 528, 530
 Make a Donation – Pledge Information page 530
 Make a Donation – Welcome page 526–527, 530
 Manage Worksets page 36–37
 Mass Actions 1 page 225, 229
 Mass Actions 2 page 225, 231
 Mass Assign Staff page 200, 203
 Mass Assign Units page 201, 204
 Mass Assign Volunteers page 201, 205
 mass change
 understanding 293
 understanding initiative template 294
 understanding membership template 295
 using 293
 Mass Load Gift/Pledge page 394
 Matching Gift Detail page 397
 Matching Gift Types page 118
 matching gifts
 applying 390
 defining organization matching rules 132
 defining types for designations 118
 handling 468
 identifying potential 389

- processing in foreign currencies 469
 - understanding 468
 - viewing expected matches 475
 - viewing for people 475
 - viewing outstanding 474
 - Matching Gifts page 381, 389–390
 - Member Adjust page 340–341
 - Member Adjust Summary page 340
 - Member Criteria page 316–317
 - Member Dues page 316, 319
 - Member Objectives page 316, 318
 - Member Organization page 316
 - member organizations
 - assigning resources 321
 - building and merging the membership list 323
 - creating 315
 - defining 316
 - defining dues 319
 - defining objectives 318
 - setting criteria 317
 - understanding 315
 - Member Resources page 316, 321
 - membership
 - defining categories 97
 - defining types 96
 - managing 313
 - preparing for letters 344
 - understanding 313
 - understanding mass change template 295
 - viewing a summary 348
 - viewing benefit history 347
 - viewing history 346
 - viewing progress 344
 - Membership Audience Build page 323
 - Membership Audience Merge page 323–324
 - Membership Category page 97
 - Membership Detail – Designation page 347
 - Membership Detail page 347
 - membership dues
 - understanding 328
 - membership entry
 - adjusting designations 342
 - adjusting dues payments 339
 - assigning designations 337
 - entering dues 328
 - entering dues payment detail 330
 - processing credit card transactions 339
 - selecting transactions to adjust 340
 - understanding dues payments 340
 - understanding gift processing in sessions 328
 - Membership Entry page 330
 - membership history
 - self-service 533
 - Membership History page 533
 - Membership History Prsn page 347
 - membership initiatives
 - defining goals 325
 - setting annual goals 326
 - setting intermediate goals 325
 - setting up 95
 - setup prerequisites 95
 - understanding setup 95
 - Membership page 271
 - Membership Progress page 345
 - Membership Summary page 348
 - Membership Type page 96
 - memberships
 - adjusting credit card payments 402
 - authorizing and settling credit card transactions as a single process 444
 - authorizing and settling denied credit card transactions 446
 - authorizing credit card transactions 441
 - reviewing credit card transactions 448
 - selecting credit card transactions for processing 440
 - selecting credit card transactions for review 447
 - selecting denied credit card transactions 445
 - settling credit card transactions 443
 - Methods page 78
 - My Action Plan page 552
 - My Reminders page 552
- N**
- names
 - managing 167
 - Names page 165
 - Narrative page 216, 218
 - notes xxx
- O**
- online gifts 524

- choosing a way to give 527
- choosing an existing campaign 529
- choosing an organization 526
- confirming and submitting payment information 528
- donating to existing campaigns 529
- entering gift information 527
- entering payment information 528
- giving by mail alternative 529
- self-service life cycle 522
- setting up 146
- starting the process 527
- understanding 524
- viewing fund information 528
- viewing payment results 528
- online pledges 529
 - choosing a way to give 531
 - confirming and submitting 532
 - entering payment information 531
 - entering pledge information 531
 - making one 531
 - pledging to an existing campaign 531
 - setting up 146
- Open Pledge Register page 417, 419
- Operator Defaults page 7
- Org/Person Relationships page 49, 51
- Organization Financial Info page 178
- Organization Locations page 177
- Organization Primary Location page 569
- Organization Profile page 183, 190
- Organization Relationship Summary page 49
- Organization Relationships page 48
- Organization Search page 161
- organizations
 - adding 177
 - defining matching gift rules 132, 180
 - entering contact data 178
 - entering department data 178
 - entering location data 177
 - maintaining financial information 178
 - reviewing data 181
 - updating and adding 392
 - viewing a profile 190
 - viewing an employee list 181
 - viewing matching gift rules 180, 472
- Other Initiative Goals page 368
- other initiatives
 - managing 367
 - setting intermediate goals 368
 - setting up 111
 - understanding management 367
 - understanding setup 111
- Other Initiatives page 271
- Other Initiatives/Others Assigned page 291
- Outreach 547
 - home page 559
 - understanding fundraising for 547
 - understanding recruiting and admissions for 568
- Outreach fundraising
 - access fundraising functionality 551
 - action plans 551
 - analyzing prospect information 564
 - ask information, editing or adding 560
 - contact report 562
 - contact report details 562
 - contact report, sending 563
 - contact report, viewing 563
 - fundraising prerequisites 548
 - managing actions 557
 - managing prospects 553
 - my prospects workset 548
 - prospect action, assigning resources 560
 - prospect action, completing 561
 - prospect action, editing or adding 559
 - prospect action, editing or adding descriptions 560
 - prospect action, editing or adding details 559
 - prospect action, linking to initiatives 560
 - prospect action, selecting one to complete 561
 - prospect action, viewing 560
 - prospect strategy, editing or adding 555
 - prospect strategy, editing or adding details 555
 - prospect strategy, linking with actions 556
 - prospect strategy, linking with initiatives 556
 - prospect strategy, viewing 556
 - reviewing reminders 552
 - selecting a prospect 554
 - sending updated biographic information 563
 - viewing assigned actions 552

- Outreach Home Page 551
- Outreach recruiting
 - recruiting and admissions functionality 568
 - viewing applicants 570
 - viewing prospects 568
- Outreach Workset Initialization
 - /Maintenance page 549
- Outstanding Matching Gifts page 471, 474

P

- participation profile 188
- Payment Result page 526, 528, 530
- Payment Schedule Adjust page 421
- people
 - adding to your system 164
 - entering addresses and phone data 166
 - entering bio/demo data 165
 - entering names and ID data 165
 - viewing a profile 183
- PeopleBook common elements xxxiv
- PeopleBooks
 - ordering xxviii
- PeopleCode, typographical conventions xxix
- PeopleSoft application
 - fundamentals xxvii
- Person Matching Gifts page 471, 475
- Person Profile page 183
- Person to Org Relationships page 49
- Person/Org Relationships page 50, 52
- Personal Asset Detail page 216
- Personal Asset Summary page 216, 220
- Personal Assets page 216, 219
- philanthropic interests
 - viewing 222
- Philanthropic Interests page 217, 222
- phone data
 - entering for organizations 177
 - entering for people 166
 - managing for people 166
- Phone Detail page 177
- photos
 - maintaining 169
- planned giving profile
 - viewing 266
 - working with 264
- Planned Giving Profile page 265–266
- planned giving prospects
 - managing 247
- Pledge Adjust page 421
- Pledge Detail page 416, 418
- Pledge Entry page 410
- pledge payment override 5
- pledge payment schedule
 - adjusting 415
 - defining 414
 - setting default 5
- Pledge Schedule Aging report 575
- Pledge Schedule page 381, 390, 410, 414–415, 417, 419
- Pledge Summary page 416, 418
- pledges 404
 - See Also* conditional pledges
 - adjusting 420
 - adjusting a payment schedule 415
 - allowing feedable 5
 - determining a payment schedule 414
 - entering 409
 - entering adjustment transactions 421
 - entering commitments 371
 - entering payments 379
 - entering transactions 410
 - entering tribute notification 388
 - loading mass transactions 394
 - receiving a scheduled pledge 390
 - understanding 409
 - understanding adjustment 420
 - understanding payments 380
 - viewing 416
 - viewing a payment schedule 419
 - viewing a summary 418
 - viewing a supervisor's summary 418
 - viewing an open register 419
 - viewing details 418
- Pooled Income Beneficiaries page 261, 263
- Pooled Income Details page 261
- Pooled Income Fund Beneficiaries page 265
- Pooled Income Fund Detail page 265
- pooled income funds
 - tracking 261
- Pooled Income Information page 261, 263
- PR plan
 - defining 282
- PR Plan page 282–283
- Preferred Class Year page 172, 174
- preferred year

- setting 174
- prerequisites xxvii
- Primary Location page 183
- printed documentation xxviii
- Process Acknowledgement page 462
- Process Giving Clubs page 477, 480
- profile compare columns
 - selecting 9
- Profile Compare Columns page 7, 489
- Profile Compare page 9, 489, 500
- profiles
 - viewing 181
 - viewing a personal 183
 - viewing an organizational 190
- Prospect Action – Action Description
 - page 558
- Prospect Action – Action Detail page 557, 559
- Prospect Action – Action Summary
 - page 560
- Prospect Action – Ask Information
 - page 558, 560
- Prospect Action – Assign Others to Action
 - page 560
- Prospect Action – Assigned Resources
 - page 558
- Prospect Action – Edit Action page 557, 559
- Prospect Action – Link Initiatives to Action
 - page 560
- Prospect Action – Linked Initiatives
 - page 558
- Prospect Action – Results – Edit Action
 - page 558, 561
- Prospect Action – Results page 558, 561
- Prospect Action – Select a Prospect
 - page 557
- Prospect Action – Summary page 558
- Prospect Action page 225, 231, 560
- Prospect Action Results – Select a Prospect
 - page 558
- prospect actions, *See* actions
- Prospect Assignments page 202
- Prospect Contact Report – Contact Report
 - Summary page 563
- Prospect Contact Report – Detail page 558
- Prospect Contact Report – Select a Prospect
 - page 558
- Prospect Contact Report – Summary
 - page 558
- Prospect Contact Report page 562
- Prospect Detail page 308
- prospect identifiers
 - setting up 55
- Prospect List page 308
- Prospect Programs page 569
- prospect strategies
 - creating 211
- Prospect Strategy – Edit Strategy
 - page 554–555
- Prospect Strategy – Link Strategy Summary
 - page 556
- Prospect Strategy – Link Strategy to Initiatives page 556
- Prospect Strategy – Linked Actions
 - page 554, 556
- Prospect Strategy – Linked Initiatives
 - page 554
- Prospect Strategy – Select a Prospect
 - page 554
- Prospect Strategy – Strategy Detail
 - page 554–555
- Prospect Strategy – Summary page 554
- Prospect Strategy Detail page 212, 215
- Prospect Strategy page 212, 214–215, 554
- prospects
 - analyzing information using
 - Outreach 564
 - clearing 228
 - implementing a plan 223
 - managing 199
 - managing actions using Outreach 557
 - managing planned giving 247
 - managing strategies using Outreach 553
 - prerequisites to setup 55
 - setting up 55
 - tracking information 215
 - understanding management 199
 - viewing 308
- Prospects by Category – Search Results
 - page 569
- Prospects by Category – Select Search Criteria page 569
- Prospects by Organization – Search Results
 - page 569
- Prospects by Organization – Select Search Criteria page 569–570
- Prospects by Region – Search Results
 - page 569

Prospects by Region – Select Search
 Criteria page 569–570
 public relations, *See* PR plan

Q

query security example 24
 Queue Sessions page 426

R

Rating Categories page 56, 60
 Rating Indicators page 56, 60
 Rating Summary page 222
 Rating Types page 56, 59
 ratings
 defining categories 60
 defining indicators 60
 defining types 59
 maintaining 220
 viewing 222
 Ratings Detail page 217
 Ratings page 217, 220
 Ratings Summary page 217
 receipts
 selecting a default 13
 Reciprocal Relationship page 53
 recognition
 assigning conditional pledges 408
 defining types 123
 setting default soft credit type 5
 setting spouse splits 5
 Recognition Detail page 397
 Recognition Types page 123
 records
 searching for 160
 searching using organization search 164
 understanding 160
 using search/match 161
 Recruiting Home Page 568
 related documentation xxviii
 related goals
 viewing 292
 Related Goals page 292
 related initiatives
 viewing responsible staff 292
 Related Initiatives page 279
 Related Rspn Prsn page 293
 Relationship Detail page 49
 Relationship Summary page 49
 relationships

 defining organization reciprocal 53
 defining person and organization 52
 establishing 47
 establishing organization to
 organization 50
 establishing organization to person 51
 establishing person to organization 50
 establishing person to person 49
 understanding 48
 Relationships page 50
 religious preference
 tracking 169
 reporting rules
 setting up 91
 Reporting Rules page 91
 reports listing 573
 Required Info/Contacts page 471
 Resource Assignment Detail page 227
 Resource Assignments page 202, 208
 Resource Filter page 202, 207
 resources
 adding 27
 adding staff and volunteers 30
 assigning for membership 321
 creating assignments 199
 creating individual assignments 205
 creating mass assignments 203
 defining staff, unit, and volunteer
 roles 33
 defining units 31
 understanding 27
 viewing assigned prospects 207
 viewing staff members and
 volunteers 33
 Resources page 280
 Restrictions page 133, 136, 471
 Role Assignments page 203, 209
 Role Assignments report 582
 generating 209
 roles
 defining 31
 defining for staff, volunteers, and
 units 33
 Roles page 30–31
 Roster Filter page 194, 196
 Roster List page 194
 Rqd Info/Contacts page 133, 137
 Rules page 133, 470
 Run Mass Change page 297–298

S

- Search/Match page 160
- Self Service Giving Inquiry – Filter Options page 542
- Self Service Giving Inquiry – Self Service Gift Log Detail page 542, 544
- Self Service Giving Inquiry – Self Service Giving Detail page 542, 544
- Self Service Giving Inquiry – Self Service Giving List page 542–543
- Self Service Giving page 534
- self-service
 - adjusting gift credit card payments 540
 - filtering gifts 542
 - generating gift sessions 533
 - investigating gift and pledge transactions 541
 - managing credit card transactions 521
 - processing credit card transactions 535
 - reviewing gift transactions 545
 - selecting denied transactions for processing 539
 - selecting gift transactions for processing 536
 - selecting gift transactions for review 544
 - setting gift transactions 537
 - settling denied gift transactions 540
 - understanding the online giving life cycle 522
 - understanding transaction types 535
 - viewing commitment summary 532
 - viewing gift details 544
 - viewing gift information 543
 - viewing gift log details 544
 - viewing giving club progress 533
 - viewing membership history 533
 - viewing pledge details 544
 - viewing pledge information 543
 - working with denied credit card transactions 538
 - working with Outreach 547
- Send BioDemo Update page 559, 563
- Send Contact Report page 559, 563
- service indicators
 - creating 40
 - setting up 65
- Session Defaults page 374, 377
- Session Detail page 374, 378
- Session Filter page 454
- Session Summary page 454, 456
- sessions
 - balancing 374
 - creating 373
 - filtering 454
 - generating self-service 533
 - initializing 374
 - loading mass transactions 394
 - managing 373
 - preparing for posting 125
 - processing and posting 427
 - queuing for posting 426
 - reopening and editing expected counts and amounts 457
 - running GL Interface 433
 - selecting defaults 377
 - selecting transactions to edit or delete 378
 - self-service 534
 - setting up item types 125
 - transferring 454, 457
 - understanding processing and posting 428
 - viewing a summary 456
 - viewing details 378
 - viewing summaries 454
 - viewing suspended 451
- setIDs
 - defining and securing 15
 - understanding 16
- spouse link
 - using 35
- staff
 - adding, *See* resources, adding
- Staff Assignment page 201, 205
- Staff Roles page 30, 33
- Staff To Do List page 244
- strategies
 - creating 212
 - viewing a summary 215
 - viewing details 215
 - viewing linked actions 214
- Strategy Summary page 212, 215
- Sub-Group Assignments page 353–354
- Sub-Groups page 105–106
- suggestions, submitting xxxi
- Supervisor Gift Summ page 398–399
- Supervisor Membership Summary page 348

Supervisor Pledge Summary page 416, 418
Suspended Sessions page 451

T

Tender Type Detail – Credit Card Entry page 330, 381
Tender Type Detail page 335, 381, 386
tender types
 defining 116
Tender Types page 116
terms 585
To Do List page 228
to do lists 13
 viewing yours 244
Top Donors page 310
Transaction Filter page 488, 498
Transaction Register page 487, 489, 500
transactions
 viewing accounting lines 449
Transfer page 454, 457, 463, 466
Tribute page 381, 388
troubleshooting
 Financials 8.4 interface 517
Trust Account Information page 253, 256, 265
Trust Beneficiaries page 253, 265
Trust Beneficiary page 256
Trust Categories page 59
Trust Detail page 253, 265
Trust Gift Information page 253, 255, 265
Trust Information page 253, 257
Trust Terms page 59
Trust Types page 59
trusts
 tracking 252
typographical conventions xxix

U

Unit Assignment page 202, 207
Unit Goals page 303, 306
Unit Roles page 30, 33
Unit To Do List page 244
units
 adding, *See* resources, adding
Units page 30–31
Update Information page 391–392
 for organizations 381
 for people 381

Update Linked Addresses page 166–167
user defaults
 defining 7

V

View Staff page 30, 33
View Volunteers page 30, 33
visual cues xxx
Volunteer Assignment Detail page 358
Volunteer Assignment page 201, 206
Volunteer Assignments 1 page 355
Volunteer Assignments 2 page 355–356
volunteer efforts
 setting up 99
 setup prerequisites 99
 understanding setup 99
Volunteer Goals page 104
Volunteer Group Assignments page 353
Volunteer History page 358
Volunteer Roles page 30, 33
Volunteer Structure page 105
Volunteer To Do List page 244
volunteers
 adding, *See* resources, adding
 assigning roles 352
 assigning to roles within the structure 353
 assigning to specific tasks 354
 creating biographic reports 358
 defining a volunteer structure 104
 defining areas of responsibility 102
 defining assignment types 102
 defining leadership types 103
 defining setup data 101
 defining subgroups 106
 managing 351
 setting goals for 104
 structuring the leadership group 105
 understanding management 351
 viewing audience history 359
 viewing history 358
Volunteers page 271

W

warnings xxxi
Ways to Give page 526–527
Web Appeals page 147, 151
Web Campaign Narrative page 147, 154
Web Campaigns page 147, 153

- Web Designations page 147, 150
- work experience
 - maintaining 176
- Work Experience page 177
- worksets
 - building from a page in the system 39
 - comparing profiles in a workset 500
 - creating 37
 - joining together 38
 - understanding 35
 - working with 35

