PeopleSoft®

PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook

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Contents

General Preface

About This PeopleBook Preface xxvii

PeopleSoft Application Prerequisites xxvii

PeopleSoft Application Fundamentals xxvii

Documentation Updates and Printed Documentation xxviii

Obtaining Documentation Updates xxviii

Ordering Printed Documentation xxviii

Additional Resources xxix

Typographical Conventions and Visual Cues xxx

Typographical Conventions xxx

Visual Cues xxxi

Country, Region, and Industry Identifiers xxxii

Currency Codes xxxii

Comments and Suggestions xxxii

Common Elements Used in PeopleBooks xxxiii

Preface

PeopleSoft Enterprise Contributor Relations Preface xxxv

PeopleSoft Products xxxv

PeopleSoft Enterprise Campus Solutions Application Fundamentals xxxv

PeopleBook Structure xxxvi

Common Elements Used in This PeopleBook xxxviii

Chapter 1

Getting Started with Contributor Relations 1

Contributor Relations Overview 1

Contributor Relations Business Processes 1

Contributor Relations Integrations 1

Contributor Relations Implementation 2

Chapter 2

Setting Up Your Contributor Relations Framework 3

Completing CR Installation 3

Page Used to Complete CR Installation....3
Setting CR Installation Defaults....3
Setting Up Institution Defaults....7
Pages Used to Set Up Institution Defaults....7
Setting Institution Default Values....7
Setting Up Bio Bit and Bio Brief Reports....9
Setting Further Institution Default Values....9
Adding Resources....11
Understanding Resources....11
Pages Used to Add Resources....14
Adding Staff and Volunteers....14
Defining Units....15
Defining Roles....15
Defining Staff, Unit, and Volunteer Roles....18
Viewing Staff Members and Volunteers....18

Chapter 3
General Functions Used Throughout the System....19
Linking a Spouse to a Constituent Record....19
Working with Worksets....19
Understanding Worksets....19
Pages Used to Work with Worksets....20
Creating a Workset....20
Joining Worksets....20
Building a Workset From a Page in the System....21
Creating Service Indicators....22
Reviewing Constituent Type and Class Year....22
Sending Email Notifications....22
Pages Used to Send Email Notifications....23

Chapter 4
Setting Up Constituent Data....25
Prerequisites....25
Defining Constituent Types....26
Understanding Constituent Types....26
Page Used to Define Constituent Types....27
Setting Constituent Types Values....27
Defining Involvement Categories....28

Page Used to Define Involvement Categories....28
Setting Involvement Category Definitions....28
Defining Involvement Types....29
Page Used to Define Involvement Types....29
Setting Involvement Types Values....29
Defining Involvement Codes....30
Understanding Involvement Codes....30
Page Used to Define Involvement Codes....31
Setting Involvement Codes Values....31
Defining Person and Organization Relationships....31
Page Used to Define Person and Organization Relationships....32
Defining Person/Org Relationships Values....32
Defining Organization Reciprocal Relationships....32
Page Used to Define Organization Reciprocal Relationships....33
Setting Reciprocal Relationship Values....33
Setting Up Contact Types....33

Chapter 5
Setting Up Prospects....35
Prerequisites....35
Setting Up Prospect Identifiers....35
Pages Used to Set Up Prospect Identifiers....36
Defining Asset Types....37
Defining Rating Types....37
Defining Rating Categories....38
Defining Rating Indicators....38
Defining Action Types....39
Defining Action Contact Types....40
Defining Action Status Codes....41
Defining Action Results....41
Defining Donor Appreciation Items....42

Chapter 6
Setting Up Initiatives....45
Understanding Initiatives....45
Prerequisites....45
Understanding General Initiatives....47
Understanding Campaigns....48

Understanding Membership Initiatives....48
Understanding Volunteer Efforts....48
Understanding Event Initiatives....48
Understanding Other Initiatives....49
Defining Initiative Types....49
Page Used to Define Initiative Types....49
Defining Initiative Types....49
Defining Audiences....50
Pages Used to Define Audiences....51
Setting Up Attribute Types....51
Setting Up Audience Criteria....53
Defining Initiative Goal Types....55
Page Used to Define Initiative Goal Types....55
Defining Goal Types....55
Defining Methods....56
Page Used to Define Methods....56
Setting Up Communication Methods....56
Using Action Components for Initiative Setup....56
Defining Action Types for Initiatives....57
Defining Action Contact Types for Initiatives....57
Defining Action Status Codes for Initiatives....57
Defining Action Results for Initiatives....57
Defining Budget Categories....57
Page Used to Define Budget Categories....57
Setting Up Budget Categories....58
Setting Up Appeal Information....58
Pages Used to Set Up Appeal Information....58
Setting Up Appeal Types....59
Setting Up Appeals....59
Setting Up Appeal Details....60
Setting Up Campaigns....60
Pages Used to Set Up Campaigns....61
Defining Donor Phases....61
Setting Up an Anticipated Gift Table....62
Defining Reporting Rules....64
Setting Up Membership Initiatives....65
Pages Used to Set Up Membership Initiatives....66
Setting Up Membership Types....66
Setting Up Membership Categories....66
Setting Up Volunteer Efforts....67

Common Elements Used in This Section....67
Pages Used to Set Up Volunteer Efforts....68
Setting Up Volunteer Resources....69
Defining Areas of Responsibility....69
Defining Assignment Types....69
Defining Leadership Types....70
Defining Volunteer Initiative Goals....71
Structuring the Leadership Group....72
Defining Subgroups....73
Setting Up Event Initiatives....74

Chapter 7
Setting Up Commitment Management....77
Prerequisites....77
Defining Gift Types....78
Page Used to Define Gift Types....78
Setting Up Gift Types....79
Defining Tender Types....79
Page Used to Define Tender Types....80
Setting Up Tender Types....80
Defining Designation Types....81
Page Used to Define Designation Types....81
Setting Up Designation Types....81
Defining Matching Gift Types for Designations....82
Page Used to Define Matching Gift Types for Designations....82
Setting Up Matching Gift Types....82
Defining Designation Funds....83
Pages Used to Define Designation Funds....83
Beginning Designation Funds Setup....83
Completing Designation Funds Setup....85
Defining Recognition Types....87
Page Used to Define Recognition Types....87
Setting Up Recognition Types....87
Defining Adjustment Reasons....88
Page Used to Define Adjustment Reasons....88
Setting Up Adjustment Reasons....88
Preparing for Session Posting....89
Setting Up Item Types....89
Completing Item Type Initial Setup....90

Defining a GL Interface....91
Preparing for Acknowledgement Letters and Receipts....93
Defining Acknowledgement Rules....94
Common Elements Used in This Section....94
Pages Used to Define Acknowledgement Rules....95
Setting Up Acknowledgements....95
Continuing Acknowledgement Setup....96
Completing Acknowledgement Setup....96
Defining an Organization's Matching Gift Rules....97
Pages Used to Define an Organization's Matching Gift Rules....98
Setting Up Matching Gift Rules....98
Setting Up Matching Gift Restrictions....100
Setting Up Required Information....102
Defining Giving Club Information....102
Pages Used to Define Giving Club Information....103
Defining Giving Clubs....103
Defining Giving Club Levels....104
Setting Up Credit Card Processing....105
Pages Used to Set Up Credit Card Processing....106
Setting Up a Connection with a Third-Party Processor....106
Defining Payment Methods....106
Defining Credit Card Types....106
Defining Connection Parameters for Third-Party Processor....107
Setting Up Self-Service Online Giving and Pledges....109
Pages Used to Set Up Self-Service Online Giving and Pledges....110
Defining Involvement Settings....111
Defining Web Designations....113
Defining Web Appeals....114
Defining Web Campaigns....115
Entering a Web Campaign Narrative....117
Defining Campaign Linked Designations....118
Defining Campaign Linked Appeals....118
Defining Giving Vehicles....119

Chapter 8
Managing Constituent Data....121
Searching for Records....122
Understanding Records....122
Pages Used to Search for Records....122

Using Search/Match Functionality....123
Searching for People....123
Viewing Search Results....124
Adding People to the System....125
Pages Used to Add People to the System....125
Managing Addresses and Phone Numbers....125
Pages Used to Manage Addresses and Phone Numbers....126
Updating Linked Addresses....126
Reviewing Address Data....126
Entering Electronic Addresses....126
Tracking External System IDs....127
Managing Names....127
Maintaining Constituent Types....127
Understanding Constituent Types....127
Pages Used to Maintain Constituent Types....128
Assigning Constituent Types....128
Tracking Religious Preferences....129
Maintaining Photos....129
Adding Constituent Types to Graduates....129
Page Used to Add Constituent Types to Graduates....129
Running the Graduates to Alumni Process....130
Maintaining Degree Information....131
Pages Used to Maintain Degree Information....132
Maintaining External Degree Information....132
Setting a Constituent's Preferred Year....134
Entering Internal Legacy Degree Information....135
Maintaining Work Experience Information....135
Pages Used to Maintain Work Experience Information....136
Adding Organizations....136
Entering Location Data for Organizations....136
Entering Department Data for Organizations....137
Entering Contact Data for Organizations....137
Maintaining Organization Financial Information....137
Page Used to Maintain Organization Financial Information....137
Entering Organization Financial Information....137
Defining an Organization's Matching Gift Rules....139
Viewing an Organization's Matching Gift Rules....139
Reviewing Organization Data....139
Viewing an Organization's Employee List....140
Page Used to View an Organization's Employee List....140

Viewing Employee Lists....140
Viewing Profiles....140
Understanding Person Profile Views....141
Pages Used to View Profiles....142
Viewing General Person Profile Information....142
Viewing a Biographic Profile....145
Viewing a Commitment Profile....146
Viewing a Participation Profile....147
Viewing an Organizational Profile....148
Updating a Donor's Record or Adding a Donor....149
Viewing a Constituent's Audience History....150
Page Used to View a Constituent's Audience History....150
Reviewing Audience History....150
Maintaining Involvement Information....151
Understanding Involvement....151
Pages Used to Maintain Involvement Information....151
Adding Involvement Records....153
Filtering Involvement Records....154
Creating an Involvement Roster....155
Establishing Relationships....155
Understanding Relationships....156
Common Elements Used in This Section....156
Pages Used to Establish Relationships....156
Establishing a Person to Person Relationship....157
Establishing an Organization to Organization Relationship....157
Establishing a Person to Organization Relationship....158
Establishing an Organization to Person Relationship....159

Chapter 9
Managing Prospects....161
Understanding Prospect Management....161
Prerequisites....161
Prospect Management....161
Creating Resource Assignments....161
Common Elements Used in This Section....162
Pages Used to Create Resource Assignments....162
Creating Mass Assignments....165
Creating Individual Staff Assignments....166
Creating Individual Volunteer Assignments....167

Creating Individual Unit Assignments....168
Viewing the Prospects Assigned to a Resource....169
Viewing Resource Assignments....170
Generating the Role Assignments Report....170
Creating Prospect Strategies....172
Pages Used to Create Prospect Strategies....173
Creating a Strategy....174
Viewing Actions Linked to a Strategy....175
Viewing a Strategy Summary....176
Viewing Prospect Strategy Details....176
Tracking Prospect Data....176
Common Element Used in This Section....176
Pages Used to Track Prospect Data....177
Creating a Biographic Narrative....179
Maintaining Personal Assets....179
Viewing Personal Assets....180
Maintaining Ratings....181
Viewing Ratings....182
Viewing a Prospect's Philanthropic Interests....182
Creating a Biographic Profile....183
Implementing a Prospect Plan....184
Pages Used to Implement a Prospect Plan....185
Clearing a Prospect for Cultivation....189
Defining Mass Action Parameters....190
Defining Additional Mass Action Parameters....192
Creating Actions for Individual Prospects....193
Entering Action Information....194
Completing Actions....196
Writing a Contact Report....197
Maintaining Donor Appreciation Items....198
Viewing a List of Appreciation Items Given....199
Viewing Donor Appreciation Details....199
Viewing Clearances for a Prospect....200
Filtering Prospect Actions....201
Viewing Existing Actions for a Prospect....203
Viewing Action Details....203
Viewing Contact Reports....204
Viewing Contact Report Details....205
Viewing To Do Lists....205

Chapter 10
Managing Planned Giving Prospects.....207
Understanding Planned Giving Prospect Management.....207
Common Elements Used in This Chapter.....207
Tracking Bequests.....209
Pages Used to Track Bequests.....209
Defining Bequest Details.....209
Defining Constituent Bequest Details.....211
Defining Institutional Bequest Information.....212
Tracking Trusts.....212
Pages Used to Track Trusts.....213
Defining Trust Details.....213
Defining Trust Gift Information.....214
Defining Trust Account Information.....215
Defining Trust Beneficiaries.....216
Defining Institutional Trust Information.....216
Tracking Gift Annuities.....217
Pages Used to Track Gift Annuities.....218
Defining Gift Annuity Details.....218
Defining Gift Annuity Beneficiaries.....219
Defining Institutional Gift Annuity Information.....219
Tracking Pooled Income Funds.....220
Pages Used to Track Pooled Income Funds.....221
Defining Pooled Income Fund Details.....221
Defining Pooled Income Fund Beneficiaries.....222
Defining Institutional Pooled Income Fund Information.....223
Working with a Planned Giving Profile.....223
Pages Used to Work with a Planned Giving Profile.....224
Viewing a Planned Giving Profile.....225

Chapter 11
Managing Initiatives.....227
Understanding Initiatives.....227
Prerequisites.....227
Initiative Management.....228
Defining an Initiative.....228
Pages Used to Define an Initiative.....229
Creating an Initiative.....229
Defining an Initiative Audience.....232

Understanding Audiences....232
Pages Used to Define an Initiative Audience....233
Defining the Audience....233
Building the Audience....235
Merging the Audience....236
Linking Related Initiatives....236
Page Used to Link Related Initiatives....236
Assigning Related Initiatives....236
Assigning Initiative Resources....237
Page Used to Assign Initiative Resources....238
Assigning Initiative Resources....238
Defining a Public Relations Plan....239
Page Used to Define a PR Plan....240
Defining a Public Relations Plan....240
Creating an Initiative Budget and Tracking Expenses....242
Pages Used to Create a Budget and Track Expenses....243
Creating a Budget....244
Tracking Budget Expenses....244
Creating Initiative Actions....245
Pages Used to Create Initiative Actions....246
Entering Initiative Action Information....247
Adding Action Information....247
Viewing Initiative Action Summary Information....248
Pages Used to View Action Summary Information....249
Viewing To Do Lists....249
Viewing Initiative Action Summary Information....249
Viewing Action Details....249
Viewing Related Goals....249
Page Used to View Related Goals....250
Viewing Related Goal Information....250
Viewing Responsible Staff for Related Initiatives....250
Page Used to View Responsible Staff for Related Initiatives....251
Using Mass Change for Initiative and Membership Letters....251
Understanding Mass Change....251
Understanding the Initiative Mass Change Template....252
Understanding the Membership Mass Change Template....253
Page Used to Use Mass Change for Initiative and Membership Letters....255
Selecting Criteria and Defaults....255
Running the Mass Change SQR Process (MASSCHNG)....256

Chapter 12
Managing Campaigns.....257
Understanding Campaign Management.....257
Prerequisites.....257
Campaign Management.....257
Managing General Initiative Information.....259
Setting Campaign Initiative Goals.....259
Pages Used to Set Campaign Initiative Goals.....259
Setting Intermediate Goals for Campaigns.....260
Setting Annual Goals.....260
Setting Department Goals.....262
Setting Unit Goals.....262
Viewing a Prospect List.....263
Pages Used to View a Prospect List.....264
Viewing Prospects.....264
Generating the Campaign Progress Report.....264
Page Used to Generate the Campaign Progress Report.....264
Generating Campaign Progress Reports.....264
Viewing the Top Donors to a Campaign.....265
Page Used to View Top Donors to a Campaign.....266
Viewing Top Donor Summaries.....266
Viewing a Summary of Campaign Initiatives.....266
Pages Used to View a Summary of Campaign Initiatives.....266
Viewing Campaign Summary Information.....266
Viewing Initiative Details.....267

Chapter 13
Managing Membership.....269
Understanding Membership.....269
Prerequisites.....269
Common Elements Used in This Chapter.....269
Membership Management.....270
Managing General Initiative Information.....270
Creating a Member Organization.....271
Understanding Member Organizations.....271
Pages Used to Create a Member Organization.....272
Defining the Member Organization.....272
Setting Member Criteria.....274
Defining Membership Objectives.....274

Defining Membership Dues....275
Assigning Membership Resources....277
Building and Merging Membership Lists....279
Pages Used to Build and Merge Membership Lists....279
Building the Member List....279
Merging the Member List....280
Defining Membership Initiative Goals....280
Pages Used to Define Membership Initiative Goals....281
Setting Intermediate Goals for Membership Initiatives....281
Setting Annual Goals for Membership Initiatives....282
Entering Member Dues....283
Understanding Membership Dues....283
Understanding Gift Processing in Membership Sessions....283
Common Element Used in This Section....284
Pages Used to Enter Member Dues....285
Entering Dues Payment Detail....285
Entering Check or Credit Card Information....289
Assigning Membership Designations and Associating Others with a Membership....291
Processing Member Credit Card Transactions....293
Adjusting Membership Dues Payments....293
Understanding Membership Dues Payment Adjustments....293
Pages Used to Adjust Membership Dues Payments....294
Selecting Posted Dues Transactions to be Adjusted....294
Adjusting Dues Payment Details....295
Adjusting Designation and Associated Constituent Information....296
Preparing for Membership Letters....298
Viewing Membership Progress....299
Page Used to View Membership Progress....299
Viewing Membership Progress....299
Viewing Membership History....300
Pages Used to View Membership History....301
Viewing Membership Benefit History....301
Page Used to View Membership Benefit History....302
Viewing a Membership Summary or a Supervisor's Membership Summary....302
Page Used to View a Membership Summary or a Supervisor's Membership Summary....302
Viewing Membership Summary Information....302

Chapter 14
Managing Volunteers.....305
Understanding Volunteer Management.....305
Prerequisites.....305
Volunteer Management.....305
Managing General Initiative Information.....306
Assigning Volunteers to Roles.....306
Pages Used to Assign Volunteers to Roles.....307
Assigning Volunteers to Roles Within the Structure.....307
Creating Sub-Group Assignments.....308
Assigning Volunteers to Specific Tasks.....309
Prerequisites.....309
Pages Used to Assign Volunteers to Specific Tasks.....310
Assigning Volunteers and Groups to Tasks.....310
Entering Constituent Data and Volunteer Evaluations.....311
Creating a Biographical Bit or Brief.....312
Reviewing Volunteer History.....312
Pages Used to View Volunteer History.....312
Reviewing Volunteer Involvement.....312
Reviewing Volunteer Audience History.....313

Chapter 15
Managing Event Initiatives.....315
Understanding Event Initiative Management.....315
Prerequisites.....315
Event Initiative Management.....315
Managing General Initiative Information.....316
Preparing for Initiative Letters.....316
Setting Intermediate Goals for Events.....317
Page Used to Set Intermediate Goals for Events.....317
Setting Event Goals.....317
Creating Events.....318
Assigning Meeting Details.....318
Tracking Event Attendance.....319
Creating Event Templates.....319
Reviewing Events, Meetings, and Attendees.....319
Viewing Your To Do List.....320

Chapter 16
Managing Other Initiatives.....321
Understanding Other Initiatives.....321
Prerequisites.....321
Other Initiative Management.....321
Managing General Initiative Information.....322
Preparing for Initiative Letters.....322
Setting Intermediate Goals.....322
Page Used to Set Intermediate Goals.....322
Setting Other Initiative Goals.....322
Viewing To Do Lists.....323

Chapter 17
Entering Commitments.....325
Understanding the Gift and Pledge Process.....325
Common Elements Used in This Chapter.....326
Creating and Working with Sessions.....327
Managing Sessions.....327
Pages Used to Manage Sessions.....328
Initializing and Balancing the Session.....328
Selecting Session Defaults.....330
Viewing Session Details and Selecting Transactions to Edit or Delete.....332
Entering Gifts and Pledge Payments.....333
Understanding Gifts and Pledge Payments.....333
Pages Used to Enter Gifts and Pledge Payments.....334
Entering a Gift Transaction.....335
Entering Check or Credit Card Information.....339
Entering Tribute Details.....341
Identifying Potential Matching Gifts.....342
Applying Matching Gifts.....342
Receiving a Scheduled Pledge.....343
Updating or Adding a Constituent Who is a Person.....344
Updating or Adding a Constituent Who is an Organization.....345
Loading Mass Gift and Pledge Transactions.....347
Page Used to Load Mass Gift and Pledge Transactions.....347
Loading Gifts and Pledges.....347
Viewing Gift Session Transactions.....349
Pages Used to View Gift Session Transactions.....350
Viewing a Gift Summary.....351

Viewing Gift Details....351
Viewing a Supervisor's Gift Session Summary....352
Adjusting Gifts and Matching Gifts....352
Understanding Gift Adjustment....352
Page Used to Adjust Gifts and Matching Gifts....353
Selecting a Transaction to Adjust....353
Entering a Gift Adjustment Transaction....353
Adjusting Matching Gift Information....355
Editing Matching Gift Information....355
Changing a Gift's Type....355
Adjusting Gift and Membership Credit Card Payments....356
Entering Conditional Pledges....358
Understanding Conditional Pledges....358
Pages Used to Enter Conditional Pledges....358
Entering Conditional Pledge Detail....359
Assigning Conditional Pledge Designations....360
Assigning Conditional Pledge Recognition....362
Entering Pledges....363
Understanding Pledges....363
Pages Used to Enter Pledges....364
Entering a Pledge Transaction....364
Determining a Pledge Payment Schedule Within a Session....367
Adjusting a Pledge Payment Schedule For a Constituent....369
Viewing Pledges....370
Pages Used to View Pledges....371
Viewing a Pledge Summary....371
Viewing Pledge Details....372
Viewing a Supervisor's Pledge Summary....372
Viewing an Open Pledge Register....372
Viewing a Pledge Payment Schedule....373
Adjusting Pledges....373
Understanding Pledge Adjustment....374
Pages Used to Adjust Pledges....374
Entering a Pledge Adjustment Transaction....375

Chapter 18
Processing Commitments....377
Understanding Credit Card Processing....377
Accessing the Credit Card Payment Pages....378

Common Elements Used in This Chapter....378
Queuing Sessions for Posting....379
Page Used to Queue Sessions for Posting....380
Queuing Balanced Sessions....380
Processing and Posting Sessions....381
Understanding Session Processing and Posting....381
Understanding the GL Interface Process....383
Understanding the Constituent Accumulators Process....385
Pages Used to Process and Post Sessions....386
Running the GL Interface Job (AVPOST and AVPOST2)....386
Running the GL Interface File Extract COBOL Process (AVPACCTL)....388
Processing Constituent Accumulators Process (AVPOST)....388
Viewing a Journal Generator Template....389
Processing Credit Card Transactions....389
Understanding Credit Card Transaction Processing....389
Pages Used to Process Credit Card Transactions....393
Selecting Gift and Membership Transactions for Processing....393
Authorizing Gift and Membership Transactions....394
Settling Gift and Membership Transactions....396
Authorizing and Settling Transactions as a Single Process....396
Working with Denied Credit Card Transactions....397
Understanding Denied Credit Card Transactions....397
Pages Used to Work with Denied Credit Card Transactions....398
Selecting Denied Gift and Membership Transactions for Processing....398
Authorizing and Settling Denied Gift and Membership Transactions....399
Reviewing Credit Card Activity....400
Pages Used to Review Credit Card Activity....400
Selecting Gift and Membership Transactions for Review....400
Reviewing Gift and Membership Transactions....401
Viewing Accounting Lines....402
Page Used to View Accounting Lines....402
Viewing Generated Accounting Lines....402
Viewing Suspended Sessions....404
Page Used to View Suspended Sessions....404
Viewing Suspended Session Information....404
Viewing Information About and Transferring Sessions....406
Pages Used to View Information About and Transfer Sessions....407
Filtering Sessions....407
Viewing a Session Summary....408
Transferring Sessions....409

Re-Opening and Editing Expected Counts and Amounts for Sessions....410
Managing the Acknowledgement Process....411
Understanding How the Acknowledgement Generation Process Works....412
Understanding Joint Acknowledgements and Spousal Relationships....412
Processing Acknowledgement Letters....414
Page Used to Process Acknowledgement Letters....414
Processing Acknowledgements Automatically Using a COBOL Process (AVPACKNL)....414
Generating Acknowledgement Letters....414
Working with Manually Generated Acknowledgements....415
Pages Used to Work with Manually Generated Acknowledgements....415
Viewing Acknowledgements in Suspense....416
Viewing Acknowledgement Details....416
Transferring an Acknowledgement....417
Viewing Acknowledgement Lists....418
Managing Joint Communications....419
Handling Matching Gifts....420
Understanding Matching Gifts....420
Understanding Matching Gift Processing and Foreign Currencies....421
Pages Used to Handle Matching Gifts....422
Viewing an Organization's Matching Gift Rules....424
Viewing an Organization's Matching Gift Restrictions....425
Viewing Outstanding Matching Gifts....426
Viewing Expected Matching Gifts....426
Viewing Matching Gifts for People....427
Viewing Matching Gifts for an Organization....427
Managing Giving Clubs....428
Understanding Giving Clubs....428
Pages Used to Manage Giving Clubs....428
Manually Generating Giving Club Memberships....429
Generating Giving Club Memberships....430
Tracking Giving Club Progress....433
Viewing a Giving Club Summary....434
Viewing a Giving Club Membership Summary....434
Generating CAE Reports....435
Page Used to Generate CAE Reports....435
Running a CAE Report....435

Chapter 19
Analyzing Giving History……437
Analyzing Donor History……437
Common Elements Used in This Section……437
Pages Used to Analyze Giving History……438
Viewing a Donor's Giving Profile……440
Viewing an Organization's Giving Profile……443
Viewing a Donor's Commitment Summary……446
Viewing Commitment Summary Details……447
Filtering Donor Commitment Registers……448
Viewing Donor Commitment Registers……449
Filtering Donor Transaction Registers……449
Viewing Donor Transaction Registers……450
Comparing Profiles In a Workset……451
Generating Designation Donor Reports……452
Page Used to Generate Designation Donor Reports……452
Running a Designation Donor List Report……452

Chapter 20
Interfacing with PeopleSoft Enterprise Financials……457
Understanding the Interface……457
Understanding Messaging……457
Setting Up Integration with Financials 8.4 or 8.8……459
Pages Used to Set Up Integration with Financials 8.4 or 8.8……459
Identifying Financials Software Version……460
Defining Batch Publish Rules……460
Defining Batch Programs……460
Setting Up Business Unit Synchronization……461
Synchronizing Contributor Relations Business Unit Data with Financials……462
Publishing Accounting Line Information Automatically……463
Page Used to Publish Accounting Line Information Automatically……464
Running the AVPOST2 Job……464
Publishing Accounting Line Information Manually……465
Pages Used to Publish Accounting Line Information Manually……465
Entering AVPACCTL Parameters……466
Running the Batch Publish Application Engine Process (EOP_PUBLISHM)……466
Monitoring Message Results and Status……467
Viewing Accounting Lines……467
Understanding Interface Setup Best Practices……468

Avoiding Integration Setup Errors....468
Avoiding Message Channel Errors....468
Avoiding Messaging Errors....469

Chapter 21
Working with Self-Service Involvement....471
Understanding Involvement....471
Understanding the Self-Service Online Giving Life Cycle....472
Understanding Self-Service Online Pledges....472
Giving Online to the Institution....473
Understanding Secure Online Giving....473
Navigating in Self-Service Involvement....474
Prerequisites....474
Pages Used to Give Online to the Institution....475
Choosing an Organization....475
Choosing a Way to Give....476
Starting the Online Giving Process....476
Entering Gift Information....476
Entering Payment Information....477
Confirming and Submitting Payment Information....477
Viewing Fund Information....477
Viewing Payment Results....477
Choosing an Existing Campaign....478
Donating to an Existing Campaign....478
Giving by Mail....478
Making a Pledge Online....478
Pages Used to Make a Pledge Online....479
Choosing a Way to Give....480
Investing in an Existing Campaign....480
Making a Pledge Online....480
Entering Pledge Information....480
Entering Payment Information....480
Confirming and Submitting a Pledge....481
Monitoring Self-Service Commitment Summary....481
Pages Used to Monitor Self-Service Commitment Summary....481
Viewing a Commitment Summary....481
Monitoring Self-Service Giving Club Progress....481
Page Used to Monitor Self-Service Giving Club Progress....482
Monitoring Self-Service Membership History....482

Page Used to Monitor Self-Service Membership History....482
Generating Self-Service Gift and Pledge Sessions....482
Prerequisites....482
Page Used to Generate Self-Service Gift and Pledge Sessions....483
Creating Self-Service Gift and Pledge Sessions (AV_INV_SESS)....483
Balancing, Queuing, and Posting Self-Service Gift Sessions....483
Processing Self-Service Credit Card Transactions....483
Understanding Self-Service Transaction Types....484
Prerequisites....484
Pages Used to Process Self-Service Credit Card Transactions....485
Selecting Self-Service Gift Transactions for Processing....485
Settling Self-Service Gift Transactions....486
Working with Denied Self-Service Transactions....487
Pages Used to Work with Denied Self-Service Transactions....488
Selecting Denied Self-Service Gift Transactions for Processing....488
Settling Denied Self-Service Gift Transactions....489
Adjusting Self-Service Gift Credit Card Payments....489
Investigating Self-Service Gift and Pledge Transactions....490
Prerequisites....490
Pages Used to Investigate Self-Service Gift and Pledge Transactions....491
Filtering for Self-Service Gifts....491
Viewing Self-Service Gift or Pledge Information....492
Viewing Self-Service Gift or Pledge Details....493
Viewing Self-Service Gift Log Details....493
Selecting Self-Service Gift Transactions for Review....493
Reviewing Self-Service Gift Transactions....494

Appendix A
AV_GP_LOAD_TBL Data Fields....497
Data Field Details....497

Appendix B
Delivered Workflows for Contributor Relations....513
Delivered Workflows for Contributor Relations....513
Send BioDemo Update....513
Send Contact Report....514

Appendix C
PeopleSoft Contributor Relations Reports.....517
Contributor Relations Reports: A to Z.....517
Contributor Relations Reports: Selected Reports.....518

Glossary of PeopleSoft Terms.....529

Index 551

About This PeopleBook Preface

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, 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.

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. 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 applications.

Note. Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. 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 the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed 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, https://www.peoplesoft.com/corp/en/login.jsp

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 PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplebookspress@mmapartner.com.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes

Resource	Navigation
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	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 letter *O*.
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 the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.

Typographical Convention or Visual Cue	Description
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (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.

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.

If the note is preceded by *Important!,* the note 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.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: "(FRA) Hiring an Employee"

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

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 Used in 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**	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. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
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).
Request ID	An ID that represents a set of selection criteria for a report or process.
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.
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.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Enterprise Contributor Relations Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft Enterprise Campus Solutions application fundamentals.
- PeopleBook structure.
- Common elements used 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 Products

This PeopleBook refers to the following PeopleSoft product: PeopleSoft Enterprise Contributor Relations.

PeopleSoft Enterprise Campus Solutions Application Fundamentals

Additional, essential information describing the setup and design of the system appears in two companion volumes of documentation called *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook*and *PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

Note. One or more pages in Contributor Relations operate in deferred processing mode. Deferred processing is described in the preface in the *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook*.

See Also

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "PeopleSoft Enterprise Campus Solutions Preface"

PeopleBook Structure

PeopleSoft PeopleBooks follow a common structure. By understanding this structure, you can use this PeopleBook more efficiently.

The PeopleBooks structure conveys a task-based hierarchy of information. Each chapter describes a process that is required to set up or use the application. Chapter sections describe each task in the process. Subsections within a section describe a single step in the process task.

Some PeopleBooks may also be divided into parts. PeopleBook parts can group together similar implementation or business process chapters within an application or group together two or more applications that integrate into one overall business solution. When a book is divided into parts, each part is divided into chapters.

The following table provides the order and descriptions of chapters in a PeopleBook:

Chapters	Description
Preface	This is the chapter you're reading now. It explains: • How to use the Application Fundamentals book. • How PeopleBooks are structured. • Common elements used in the PeopleBook, if necessary.
Getting Started With…	This chapter discusses product implementation guidelines. It explains: • The business processes documented within the book. • Integrations between the product and other products. • A high-level documentation to how our documentation maps to the overall implementation process; it doesn't offer step-by-step guidance on how to perform an actual implementation.
Navigation	(Optional) Some PeopleSoft applications provide custom navigation pages that contain groupings of folders that support a specific business process, task, or user role. When an application contains custom navigation pages, this chapter provides basic navigation information for these pages. **Note.** Not all applications have delivered custom navigation pages.
Understanding…	(Optional) This is an introductory chapter that broadly explains the product and the functionality within the product.

Chapters	Description
Setup and Implementation	This can be one or more chapters. These chapters contain documentation to assist you in setting up and implementing the product. For example, if functionality X is part of a product, this chapter would be devoted to explaining how to set up functionality X, not necessarily how to use functionality X. You would look to the corresponding business process chapter to learn how to use the functionality. **Note.** There may be times when a small amount of business process information is included in a setup chapter if the amount of business process documentation was insufficient to create a separate section in the book.
Business Process	This can be one or more chapters. These chapters contain documentation that addresses specific business processes with each chapter generally devoted to a specific functional area. For example, if functionality X is part of a product, this chapter would be devoted to explain how the functionality works, not necessarily how to set up functionality X. You would look to the corresponding setup and implementation chapter to learn how to set up the functionality. **Note.** There may be times when a small amount of setup and implementation information is included in a business process chapter if the amount of setup and implementation documentation was insufficient to create a separate chapter in the book.
Appendixes	(Optional) If the book requires it, one or more appendixes might be included in the book. Appendixes contain information considered supplemental to the primary documentation.
Delivered Workflow Appendix	(Optional) The delivered workflow appendix describes all of the workflows that are delivered for the application. **Note.** Not all applications have delivered workflows.
Reports Appendix	(Optional) This appendix contains an abbreviated list of all of the product's reports. The detailed documentation on the use of these reports is usually included in the related business process chapter.

Common Elements Used in This PeopleBook

Start Date and **End Date**	Enter a start 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 *Person* or *Organization* 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 *Current, Historical,* or *All* to determine the time frame for which you want to view information. If you select All, 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 *Alumni, Friend, Parent, Faculty, Staff* and so on. These values are shipped with the system in the Constituent Type table and should not be altered.

CHAPTER 1

Getting Started with Contributor Relations

This chapter discusses:

- Contributor Relations overview.
- Contributor Relations business processes.
- Contributor Relations integrations.
- Contributor Relations implementation.

Contributor Relations Overview

Contributor Relations enables you to enter, track, and maintain biographic and demographic information about your constituents, as well as create and monitor comprehensive strategic and cultivation activity plans for prospects. For all prospects in the system, you can create, manage, and evaluate fundraising efforts such as campaign initiatives, membership programs, and volunteer activities. You can track and acknowledge all types of commitments made by constituents and analyze donors' giving. In addition, you can manage and process gift payments made by credit card and through online giving sessions. Self-service Involvement enables online gifts and pledges for constituents and Self-Service Outreach provides tools for development officers at an institution.

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

Contributor Relations Business Processes

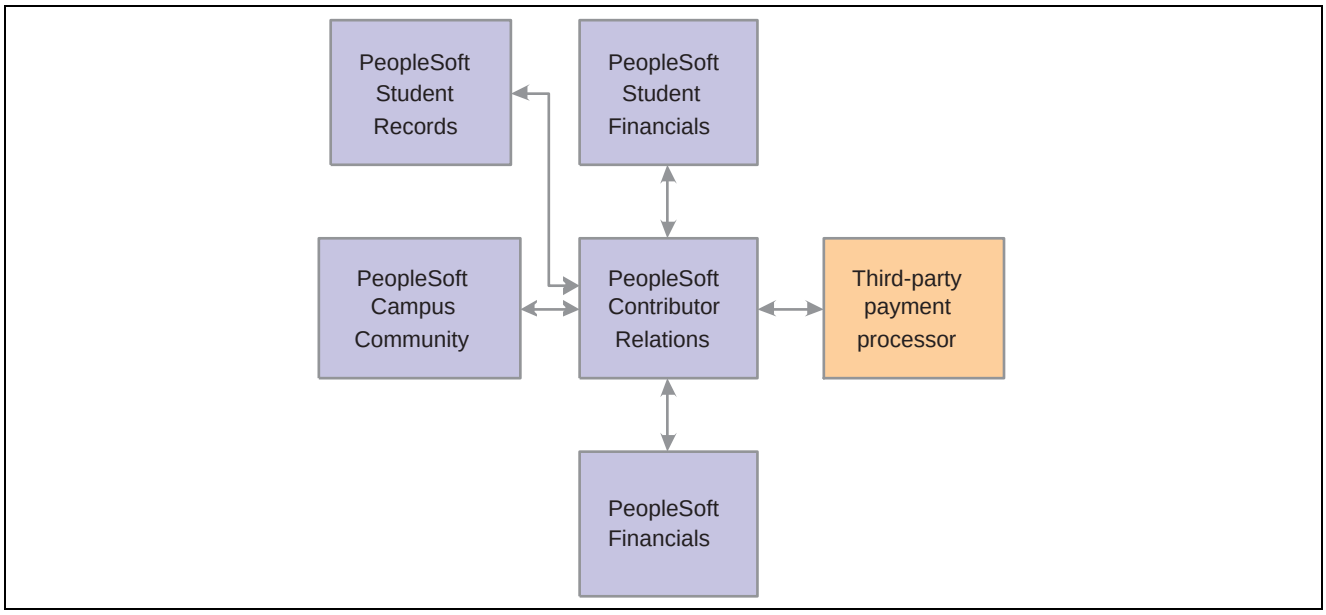
Contributor Relations provides these business processes:

- Manage prospects and planned giving prospects.
- Manage campaigns and other initiatives.
- Enter and process commitments.

We discuss these business processes in the business process chapters in this PeopleBook.

Contributor Relations Integrations

Contributor Relations integrates with these PeopleSoft applications:



Contributor Relations integrations

We discuss integration considerations in the implementation chapters in this PeopleBook. Supplemental information about third-party application integrations is located on the PeopleSoft Customer Connection website.

Contributor Relations Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook*, with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "PeopleSoft Enterprise Campus Solutions Preface"

Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces

PeopleSoft Setup Manager for PeopleSoft Enterprise HRMS and Campus Solutions 8.9 PeopleBook

CHAPTER 2

Setting Up Your Contributor Relations Framework

This chapter discusses how to:

- Complete Contributor Relations (CR) installation.
- Set up institution defaults.
- Add resources.

See Also

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Securing Contributor Relations"

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Setting User Defaults," Defining Contributor Relations User Defaults

Completing CR Installation

To set up CR installation defaults, use the Contributor Rel Installation component (AV_INSTALLATION).

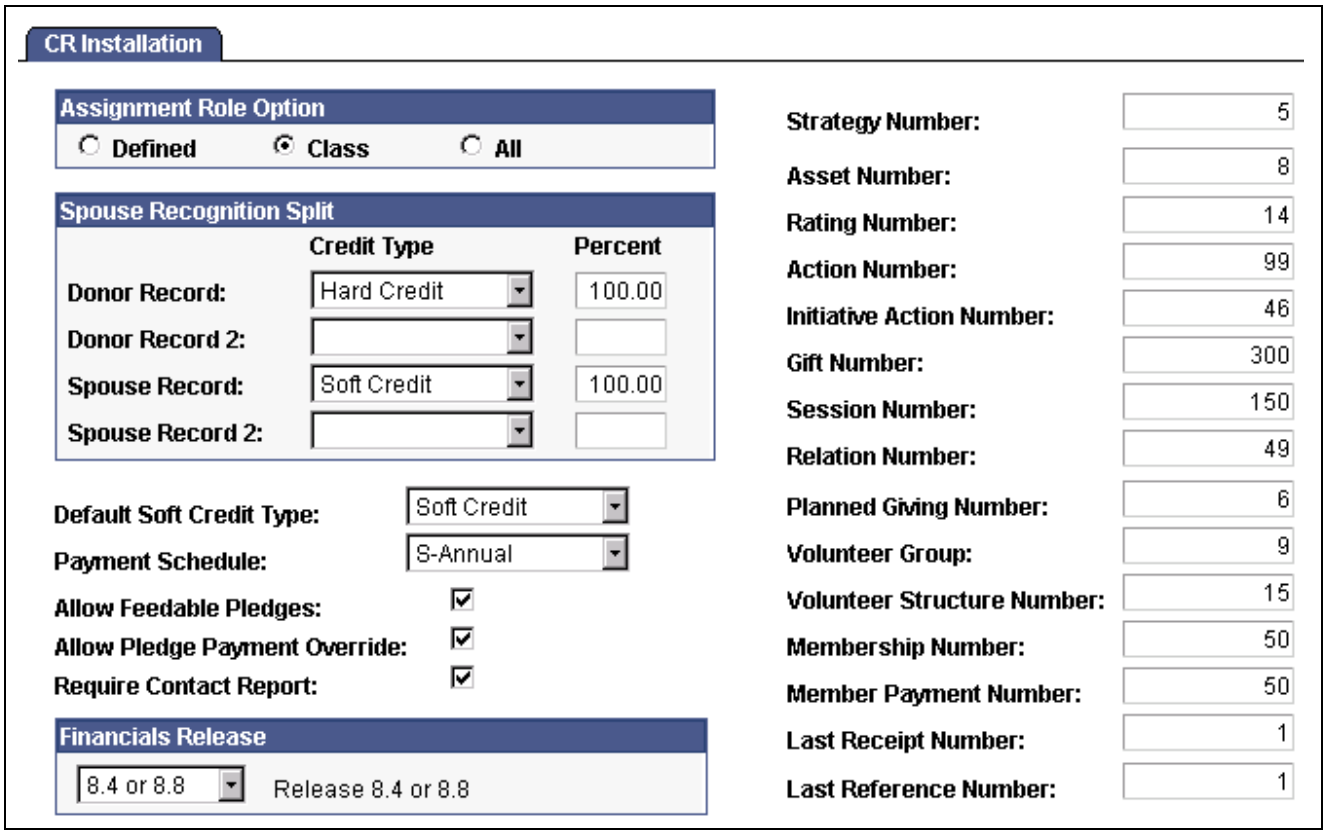
This section discusses how to set CR installation defaults.

Page Used to Complete CR Installation

Page Name	Object Name	Navigation	Usage
CR Installation	AV_INSTALLATION	Set Up SACR, Install, Contributor Rel Installation	Define system-wide business rules for many functional areas within the CR 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 after the conversion is complete.

Setting CR Installation Defaults

Access the CR Installation page.



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 that 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 *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 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 the institution can be assigned as Prospect Managers, regardless of whether they have been assigned that role.

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

See Chapter 2, "Setting Up Your Contributor Relations Framework," Defining Roles, page 15.

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 the spouse. These values are used to calculate spouse recognition on the Recognition page, 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 who makes 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 that 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 dialog 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 the 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 send a particular pledge occurs when you enter each transaction individually. The system includes only pledges with the Feed Pledge check box selected in the AV_ACCTG_LN record that is created through the GL Interface process.

Allow Pledge Payment 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 sent to the financial system.

Determining Whether Contact Reports are Required

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

Require Contact Report Select this option if contact reports are required for each completed action at the institution. When you select this check box, you are required to write a contact report before saving an action as *Completed.*

Financials Release

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 Contributor Relations system uses 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 Enterprise Financials and by an external financial application. The value *8.4 or 8.8* triggers an integrated messaging interface.

See Chapter 20, "Interfacing with PeopleSoft Enterprise Financials," page 457.

Setting Last Record Numbers

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

Important! After you set these numbers, PeopleSoft recommends that you never reset it or decrease it, to avoid duplicate key errors. However, you can increase these numbers.

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

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

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

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

Enter the last Initiative Action Number, assigned to the most recent initiative action.

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

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

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

Enter the last Planned Giving Number, assigned to the most recent planned gift.

Enter the last Volunteer Group, assigned to the most recent volunteer group.

Enter the last Volunteer Structure Number, assigned to the most recent volunteer structure.

Enter the last Membership Number, assigned to the most recent membership in a member organization.

Enter the last Membership Payment Number, assigned to the most recent membership dues payment.

Enter the Last Receipt Number, assigned to the most recent online gift or pledge.

Enter the Last Reference Number, assigned to the most recent credit card transaction processed.

Setting Up Institution Defaults

To set up institution defaults that are used throughout the system, use the Institution Defaults component (AV_INSTALL_INST).

This section discusses how to:

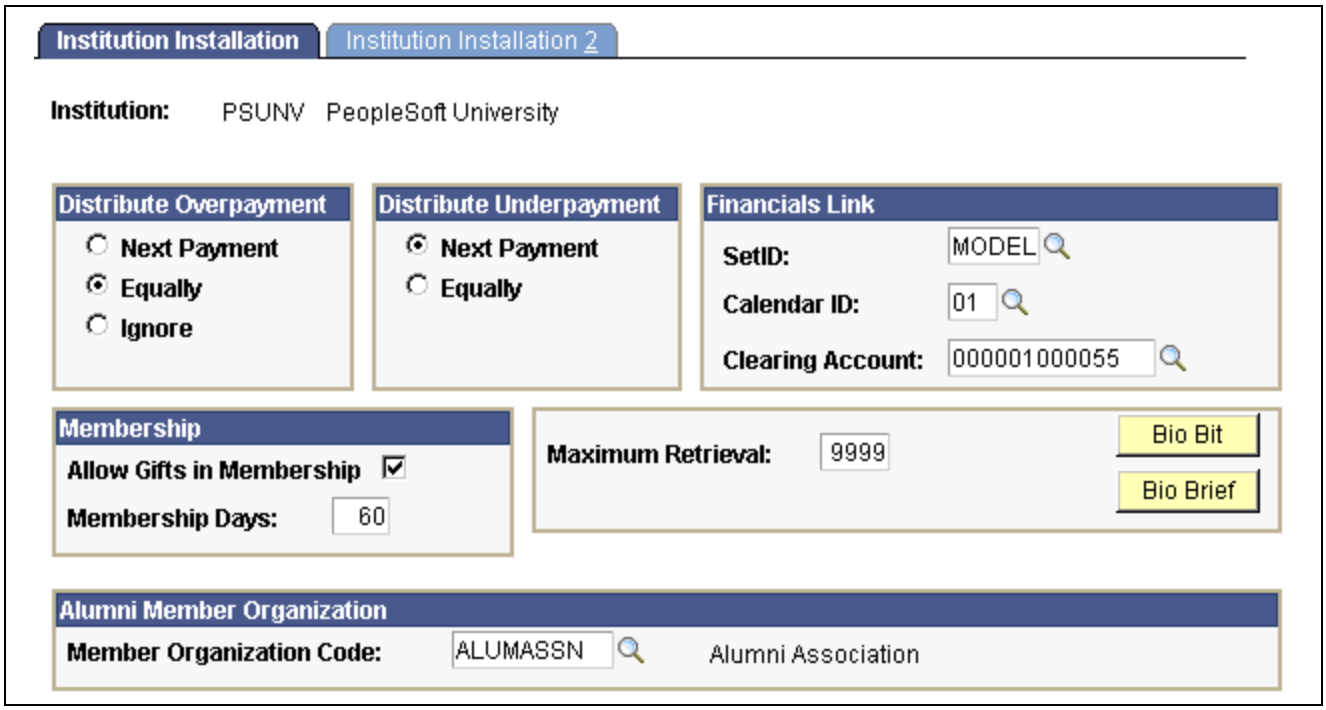
- Set institution default values.
- Set up the Bio Bit and Bio Brief reports.
- Set further institution default values.

Pages Used to Set Up Institution Defaults

Page Name	Object Name	Navigation	Usage
Institution Installation	AV_INSTALL_INST	Set Up SACR, Product Related, Contributor Relations, Install Contributor Relations, Institution Defaults, Institution Installation	Begin the process of setting institution default values that are 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 that is generated by the 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 that is generated by the institution.
Institution Installation 2	AV_INSTALL_INST2	Set Up SACR, Product Related, Contributor Relations, Install Contributor Relations, 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 page

Distribute Overpayment

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

Next Payment Select this option to deduct the amount of the overpayment from the next scheduled pledge payment.

Equally Select this option to evenly distribute the overpayment throughout all remaining expected pledge payments.

Ignore Select this option to retain the pledge schedule as is, without being affected by the additional amount paid by the donor.

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.

Financials Link

SetID This setID appears by default in fields throughout the system. It is used when entering gift annuities, pooled income funds, or trusts in Planned Giving. It is also used to determine the calendar that defines the fiscal year in commitment and membership entry.

Calendar ID Select the default ID for the institutional calendar that determines the fiscal year.

Clearing Account Enter the default clearing account to be used when processing membership and gift transactions. The clearing account holds refunds for donors. The available values for this field include all the valid item types that 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 manually issued, this clearing account should be debited and the tender account should be credited.

Membership

Allow Gifts in Membership Enables you to enter additional gifts through the Membership Entry page

Membership Days Enter a number of days before a membership period ends. This number represents the period of time during which payments are credited to the next membership period.

For example, a member organization resets membership every June 1. You set the Membership Days field to 31 days. Any dues payments that are received for that membership organization after May 1 are credited toward the next membership period.

Other Page Elements

Maximum Retrieval Enter the maximum number of records that the system retrieves on the involvement roster at one time. If this number is exceeded, the system displays a warning message telling the user that additional records exist and cannot be retrieved without limiting search criteria.

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.

Setting Up 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 specialized report.

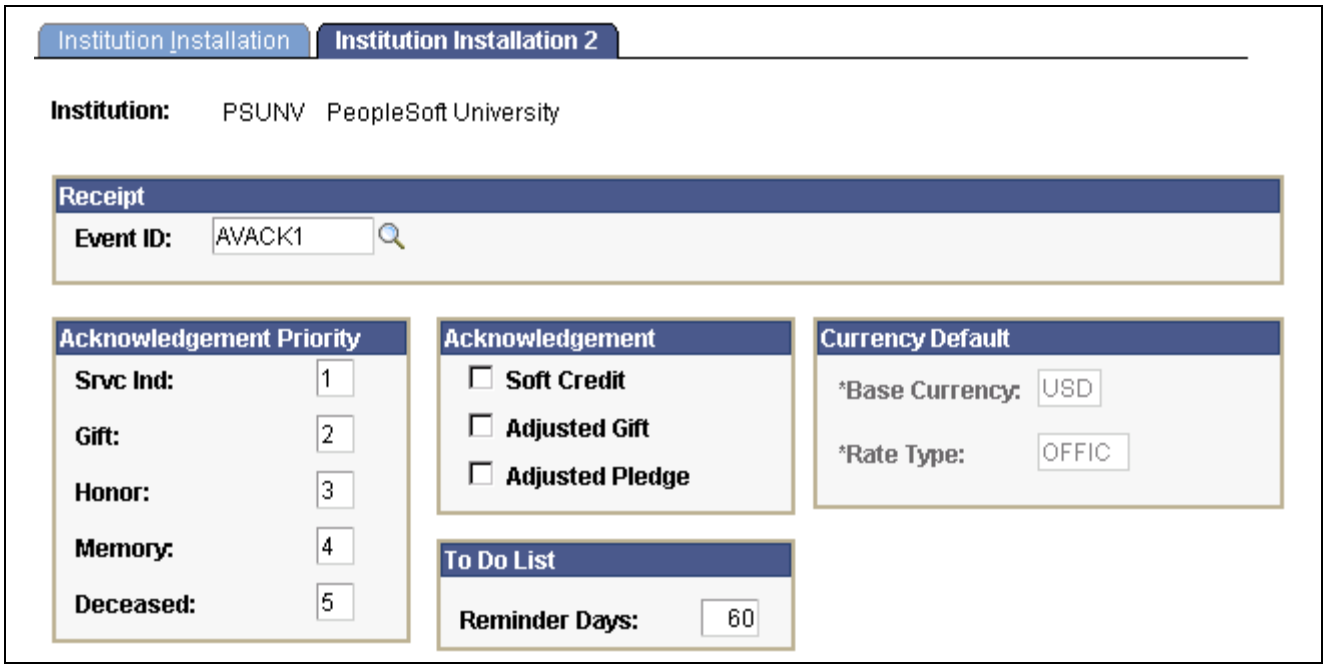
See Also

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Setting User Defaults," Specifying Custom Setup for the Bio Bit and Bio Brief Reports

Appendix C, "PeopleSoft Contributor Relations Reports," Contributor Relations Reports: Selected Reports, page 518

Setting Further Institution Default Values

Access the Institution Installation 2 page.



Institution Installation 2 page

Receipt

Event ID Select the event ID that contains the letter code for the default receipt that your institution issues.

Acknowledgement Priority

Enter numbers to represent the priority for sending acknowledgement letters. The priority that you set determines which acknowledgement setup parameters the system reviews 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 soft credit on a gift, no soft credit acknowledgement is produced unless this option is checked. The system never generates a receipt for soft credit only recognition, even if this option is checked or the gift is joint with a hard credit donor.

Adjusted Gift, Adjusted Pledge Select to indicate that you want the system to generate acknowledgements for adjusted gifts or adjusted pledges.

If you select either of these two check boxes, the system generates acknowledgements for adjustments based on the rules from the Acknowledgement Setup2 page. If you clear these check boxes, the system does not require acknowledgement rules for adjustments on the Acknowledgement Setup2 page.

Note. If a designation has its own acknowledgement defined, the system creates a letter acknowledging a gift to that designation 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 that you select here. To protect historical data, after 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 Market Rate,* and *Free Market Rate.* To protect historical data, after you select a value for this field and save the page, you cannot make additional changes.

Adding Resources

To set up resources, use these components: Staff (AV_STAFF), Volunteers (AV_VOLUNTEERS), Units (AV_UNIT_TBL), Roles (AV_PRPS), Staff Roles (AV_STAFF_PRPS), Unit Roles (AV_UNIT_PRPS), and Volunteer Roles (AV_VOL_PRPS).

This section provides an overview of resources and 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 the 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 or volunteer. This process is required to have access to many functions throughout the Contributor Relations system. We recommend that you spend some time determining the roles at your institution and carefully assign resources to those roles.

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

Page Name	Title
AV_ACKNLDG_SETUP	Acknowledgement Setup1
AV_ACKNLDG_SETUP2	Acknowledgement Setup2
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

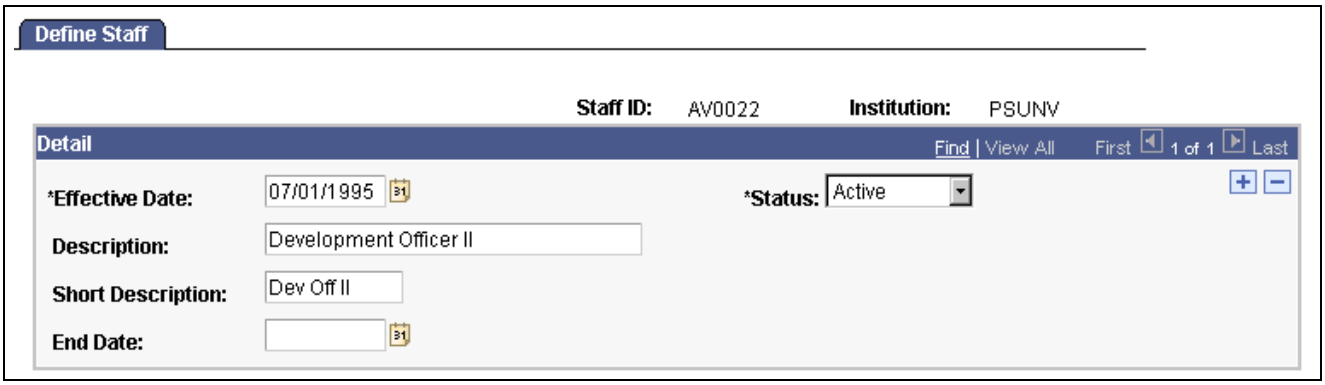
Page Name	Title
AV_MASS_VOL_WS	* Mass Assign Volunteers (workset version)
AV_PINC_INFO	* Pooled Income Information
AV_STAFF_ASGN	* Staff Assignment
AV_TRUST_INFO	* Trust Information
AV_UNIT_ASGN	* Unit Assignment
AV_VOL_ASGN	* Volunteer Assignment
AV_VOL_GRP1_ASGN	Volunteer Group Assignments
AV_VOL_GRP2_ASGN	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	• Set Up SACR, Product Related, Contributor Relations, CR Common Definitions, Resources, Staff • Set Up SACR, Product Related, Contributor Relations, CR Common Definitions, Resources, Volunteers	Add staff members and volunteers to the system individually.
Units	AV_UNIT_TBL	Set Up SACR, Product Related, Contributor Relations, CR Common Definitions, Resources, Units	Define the formal and informal organizational units at your institution for fundraising and cultivation purposes.
Roles	AV_PRPS_TBL	Set Up SACR, Product Related, Contributor Relations, CR Common Definitions, Resources, 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	• Set Up SACR, Product Related, Contributor Relations, CR Common Definitions, Resources, Staff Roles • Set Up SACR, Product Related, Contributor Relations, CR Common Definitions, Resources, Unit Roles • Set Up SACR, Product Related, Contributor Relations, CR Common Definitions, Resources, Volunteer Roles	Set up valid roles for individual resources at your institution.
View Staff, View Volunteers	AV_INST_STAFF, AV_INST_VOL	Contributor Relations, Initiatives, Volunteer Initiatives, Volunteer Listing	View a list of all the staff members and volunteers defined at your institution.

Adding Staff and Volunteers

Access the Define Staff page.

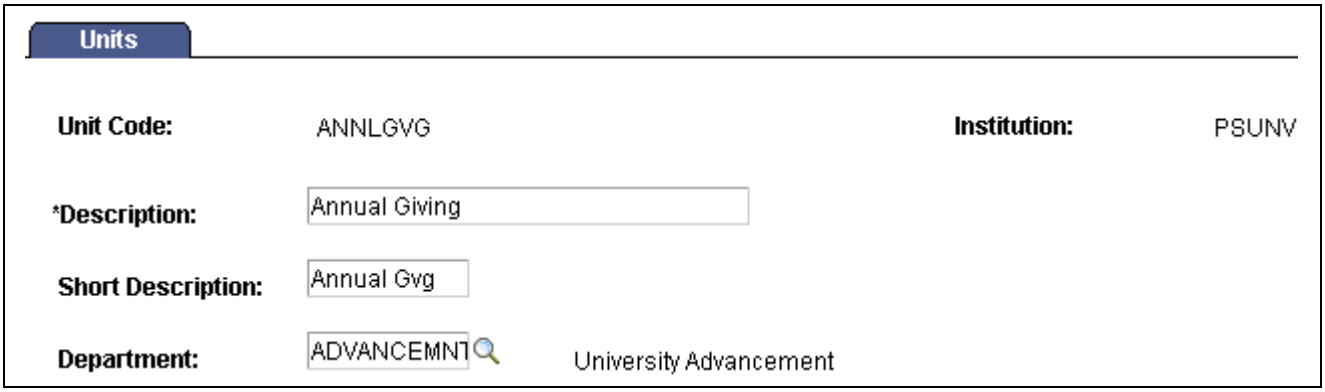


Define Staff page

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

Defining Units

Access the Units page.



Units page

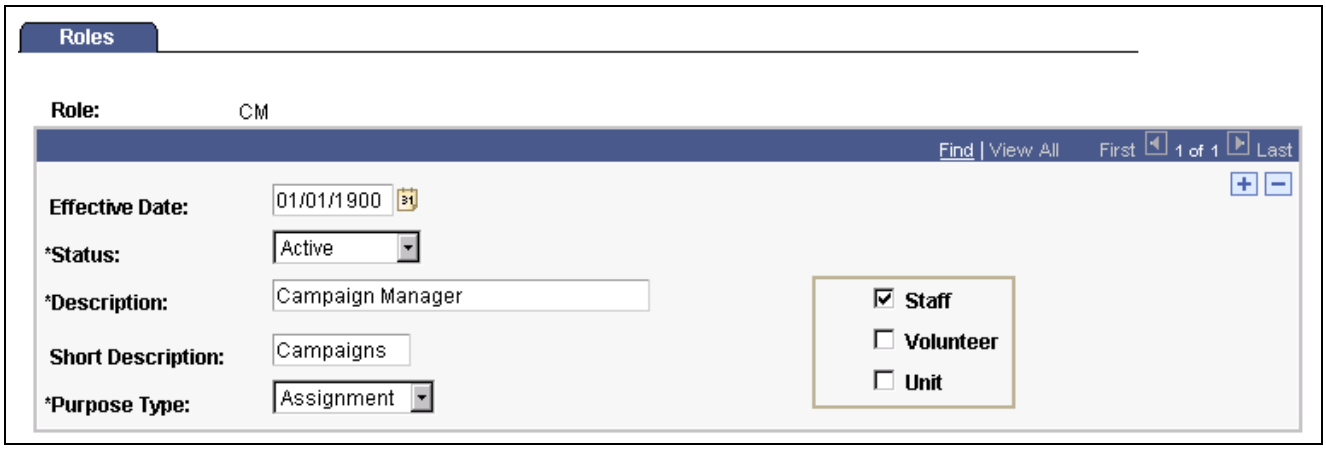
The units that you define here are for use by this application only, and are different from the business units that are used to differentiate between sectors of your institution throughout the system. Using prospect management functionality, you have the ability to assign institutional units to prospects 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 reports only.

Defining Roles

Access the Roles page.



Roles page

A role is a description of the undertakings in which a resource participates at your institution. Examples of roles include Prospect Manager, Solicitor, Campaign Manager, and so on. Roles are used throughout the 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:

Code	Value	Where Used	What it Does
PM	Prospect Manager	Prospect Management	Only one prospect manager can be assigned to a constituent for a specific period. Assignment periods must be unique.
SOL	Solicitor	Prospect Management	When assigning solicitors, only staff or volunteers who are identified as a solicitor appear as available values.
GPS	Gift and Pledge Supervisor	Session Management	Assigning the GPS role to an individual gives special authority in session management to reopen a session's expected amounts and counts, reopen a balanced session, or transfer sessions between users on the Session Summary page.

Code	Value	Where Used	What it Does
GE	Gift Entry Operator	Session Management	Assigning the GE role to a user provides the ability to see the user's sessions in session management and on the Session Summary page. It prevents the user from seeing another user's sessions. This limitation is based on user ID.
GCA	Giving Club Administrator	Giving Club Management	Only a user with this role can add members to a giving club.
MS	Membership Supervisor	Membership Management	Assigning the MS role to an individual gives special authority in session management to reopen a membership session's expected amounts and counts, reopen a balanced membership session, or transfer membership sessions between users on the Session Summary page.

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 this check box 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.

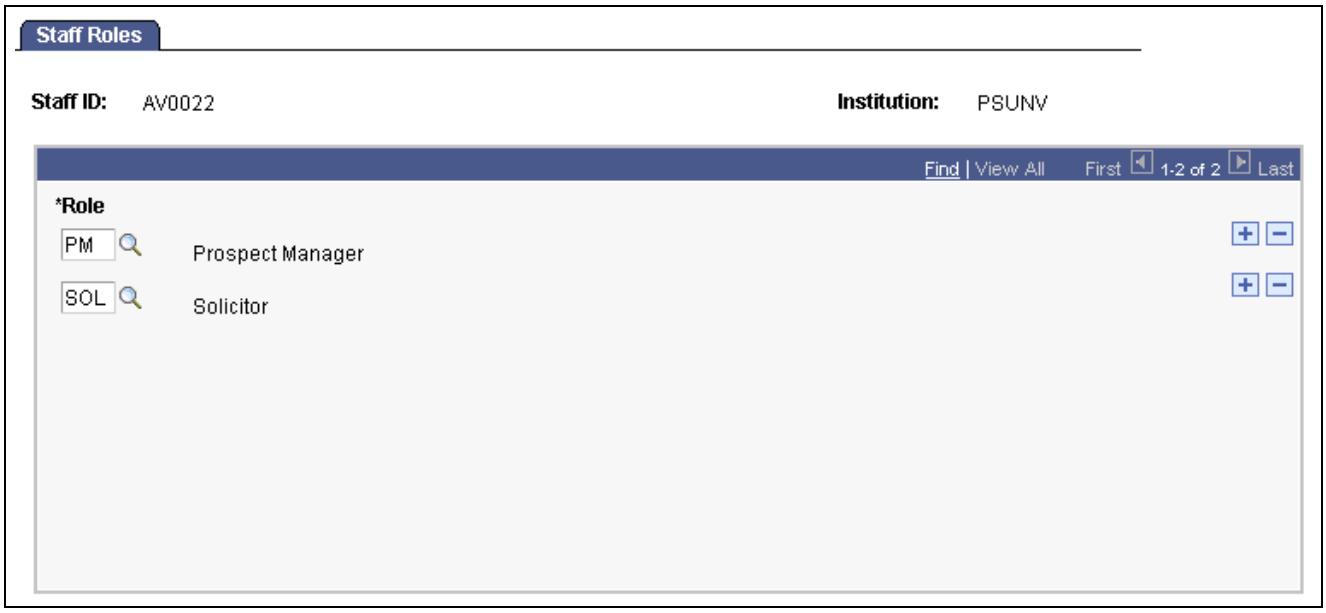
Volunteer Select this check box to indicate that this role applies to volunteer resources.

Unit Select this check box 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 the Class option, you indicate that all the role codes 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 the 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 that 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 that 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 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.

CHAPTER 3

General Functions Used Throughout the System

This chapter discusses how to:

- Link a spouse to a constituent record.
- Work with worksets.
- Create service indicators.
- Modify constituent type and class year.
- Send email notifications.

Linking a Spouse to a Constituent Record

When you have established the constituent's relationship with the spouse, 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. When 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 from 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 review or update information. Worksets can contain both people and external organizations within a single workset.

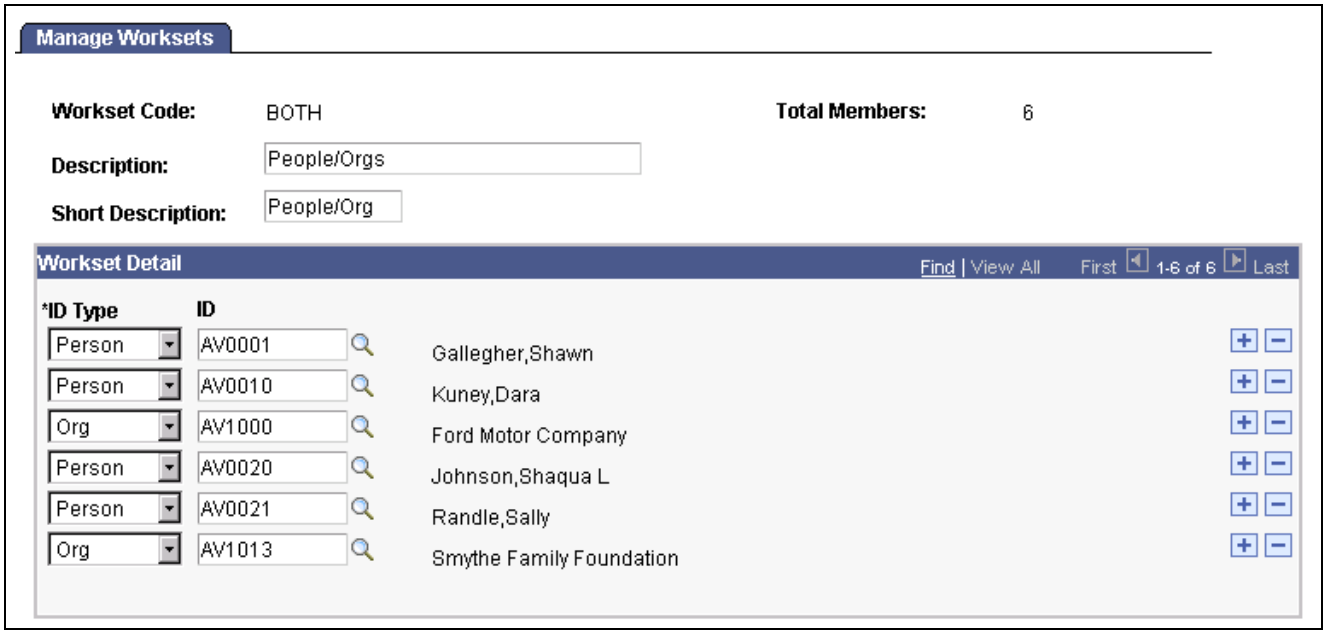
You can load a workset into a page to work with a set of records at one time, rather than individually accessing each record. You can also save, update, join, and reuse worksets.

Pages Used to Work with Worksets

Page Name	Object Name	Navigation	Usage
Manage Worksets	AV_WORKSET	Contributor Relations, Constituent Information, Workset, Manage Worksets	Create or update worksets.
Join Worksets	AV_WSET_JOIN	Contributor Relations, Constituent Information, Workset, 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 page

Total Members The number of records in the workset.

Description A free-text field that describes 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 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 Select a method for joining the two worksets.

Add: Select to add the records in the selected workset to the records in another workset without excluding any records.

Exclusive: Select to remove non-matching records from both worksets.

Build Click to create the workset.

Worksets To Be Joined

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

Building a Workset From a Page in the System

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

- Prospect List
- Employee List
- Involvement Roster
- Acknowledge Suspense
- Acknowledgement 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 that you selected.
6. Select *Exclusive* to remove records from an existing workset that do not match the records that 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 are identical to those used in the PeopleSoft Enterprise Campus Community application.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Setting Up Service Indicators"

Reviewing Constituent Type and Class Year

On many pages in Contributor Relations, the system displays a person's constituent type as a link, as well as class year. When you click the Constituent Type link, you access the Constituent Type Summary page, where you can review historical constituent types for that person. Clicking the Class Year link displays the constituent's Academic Information Summary page.

Sending Email Notifications

On many pages in Contributor Relations, you have the option to send an email to constituents. For example, after reviewing a person's Person Profile, you might send an email to the constituent to request an information update, or to invite the constituent to participate in a special event of interest, based on information on their record.

Pages Used to Send Email Notifications

Page Name	Object Name	Navigation	Usage
Send Notification	PT_WF_NOTIFY	Click the Notify button on any page in the system where it is available.	Enter email details, such as addresses and message content.
Send Notification - Lookup Address	PT_WF_NOTFY_LOOKUP	Click the Lookup Recipient link on the Send Notification page.	Create an email recipient list or search for email addresses.
Send Notification - Delivery Options	PT_WF_NOTFY_DOPTNS	Click the Delivery Options link on the Send Notification page.	View or change the delivery method of the email.

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.
- Establish relationships.
- Define person and organizational relationships.
- Define organization reciprocal relationships.
- Set up contact types.

Note. This portion of Contributor Relations is intended to expand on the functionality provided in PeopleSoft Enterprise 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 the system for processing people and organization data, consider the following questions:

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

  Consider creating a spreadsheet that includes staff member names, job titles, 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 that you set up are used for both people and organizations.
- What constituent involvement does your institution track?

  Consider creating 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 use at organizations?

Defining Constituent Types

To set up constituent types, use the Constituent Types component (AV_CTYP_CD_TBL).

This section provides an overview of constituent types and discusses how to set up constituent data.

Understanding Constituent Types

Constituent types describe the relationships between a constituent and an 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 the system and should only be changed if CASE codes change because the system uses them to produce the annual CASE gift income report.

Constituent Types Required Values

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

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 Person Type
10	Corporation
11	Corporate Foundation
12	Foundation

Code	Value
13	Personal, Family Foundation
14	Fund-Raising Consortia
15	Association
16	Religious Organization
17	Government
18	Government Foundation
19	Other Organization Type

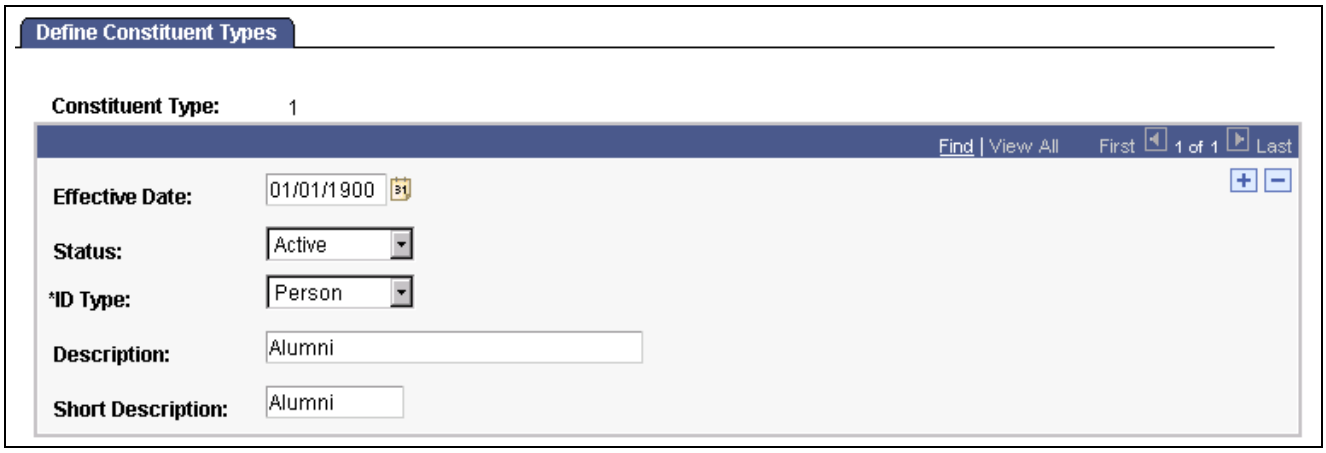
Important! When you define constituent types, the number that you enter in the Constituent Type field defines the priority for the type according to CASE. When people and organizations have multiple constituent types assigned to them, the type with the highest priority (lowest constituent type number)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

Page Used to Define Constituent Types

Page Name	Object Name	Navigation	Usage
Define Constituent Types	AV_CTYP_CD_TBL	Set Up SACR, Product Related, Contributor Relations, Constituent Information, Constituent Types	Define the valid relationships between a person or organization (a constituent) and an institution.

Setting Constituent Types Values

Access the Define Constituent Types page.



Define Constituent Types page

Examples of constituent types are alumni, friend, parent, and faculty.

ID Type Specify 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* for one ID type, and then selecting *Org ID* for the other ID type.

Defining Involvement Categories

To set up involvement categories, use the Involvement Categories component (AV_INVLV_C_TBL).

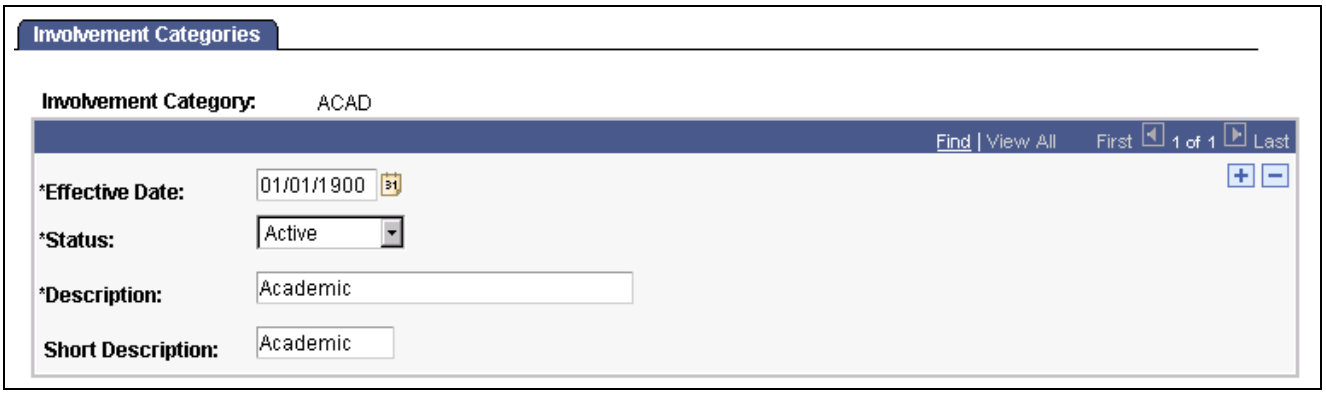
This section discusses how to define involvement categories.

Page Used to Define Involvement Categories

Page Name	Object Name	Navigation	Usage
Involvement Categories	AV_INVLV_C_TBL	Set Up SACR, Product Related, Contributor Relations, Constituent Information, Involvement Categories	Define the various categories used to sort involvement information.

Setting Involvement Category Definitions

Access the Involvement Categories page.



Involvement Categories page

Involvement refers to 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.

Involvement Categories Required Values

The following values are required in the AV_CTGY_CD field that resides in the AV_INVLV_C_TBL table:

Code	Value
CHAR	*Charitable*

Defining Involvement Types

To set up involvement types, use the Involvement Types component (AV_INVLV_T_TBL).

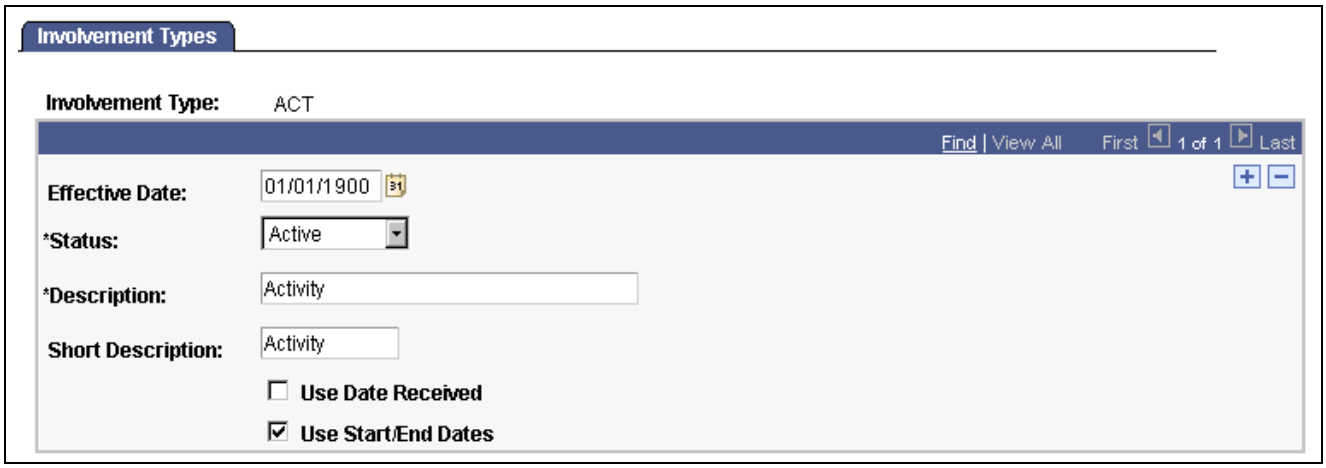
This section discusses how to define involvement types.

Page Used to Define Involvement Types

Page Name	Object Name	Navigation	Usage
Involvement Types	AV_INVLV_T_TBL	Set Up SACR, Product Related, Contributor Relations, Constituent Information, Involvement Types	Define the various types of constituent involvement to track.

Setting Involvement Types Values

Access the Involvement Types page.



Involvement Types page

Examples of involvement types are activities, interests, awards and honors, and affiliations.

Use Date Received Select if the involvement type is associated with a 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 is associated with 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

To set up involvement codes, use the Involvement Codes component (AV_INVLV_CD_TBL).

This section provides an overview of involvement codes and discusses how to set involvement code values.

Understanding Involvement Codes

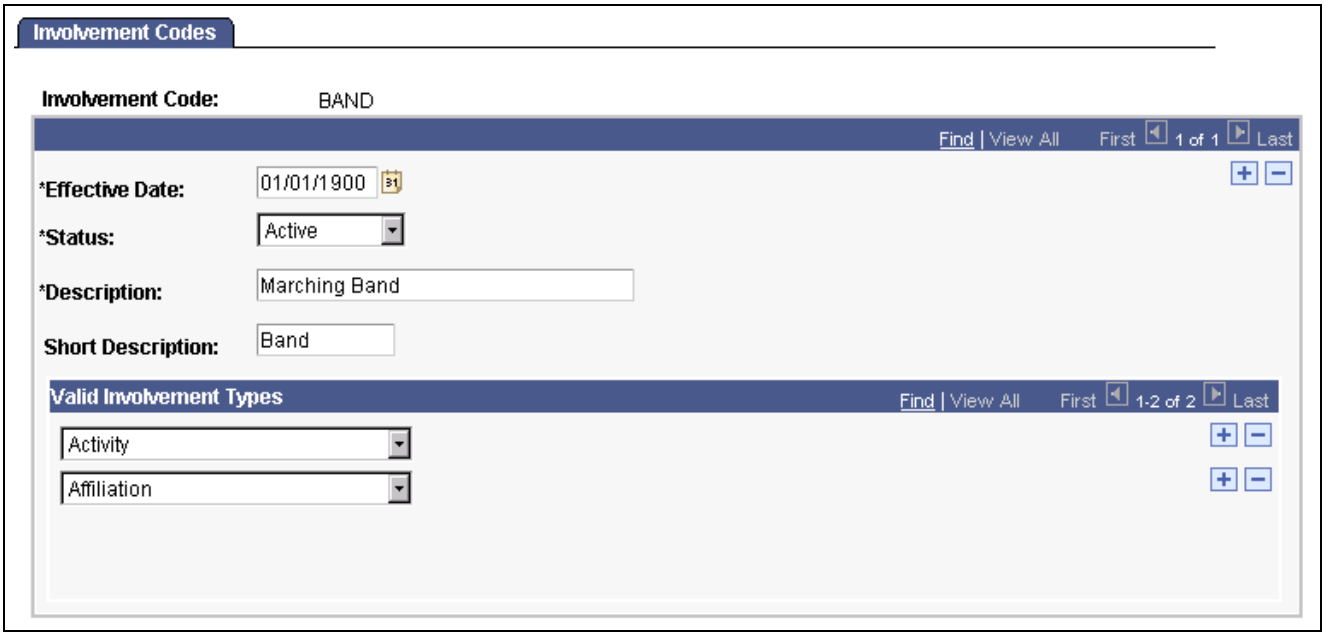
Involvement is a constituent's participation tracked as activities, affiliations, interests, and awards and honors. When you create an involvement record, you identify the involvement type, a code for the actual involvement and its related description, a category such as charitable or political, an institution, and start and end dates. For example, you might set up an involvement code called GOLF, for which the related description might read "Avid Golfer."

Page Used to Define Involvement Codes

Page Name	Object Name	Navigation	Usage
Involvement Codes	AV_INVLV_CD_TBL	Set Up SACR, Product Related, Contributor Relations, Constituent Information, Involvement Types	Define the different types of involvement to track at the institution.

Setting Involvement Codes Values

Access the Involvement Codes page.



Involvement Codes page

Valid Involvement Types Select the involvement types that can use 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 29

Defining Person and Organization Relationships

To set up person and organization relationships, use the Person/Org Relationships component (AV_PE_RELATION_TBL).

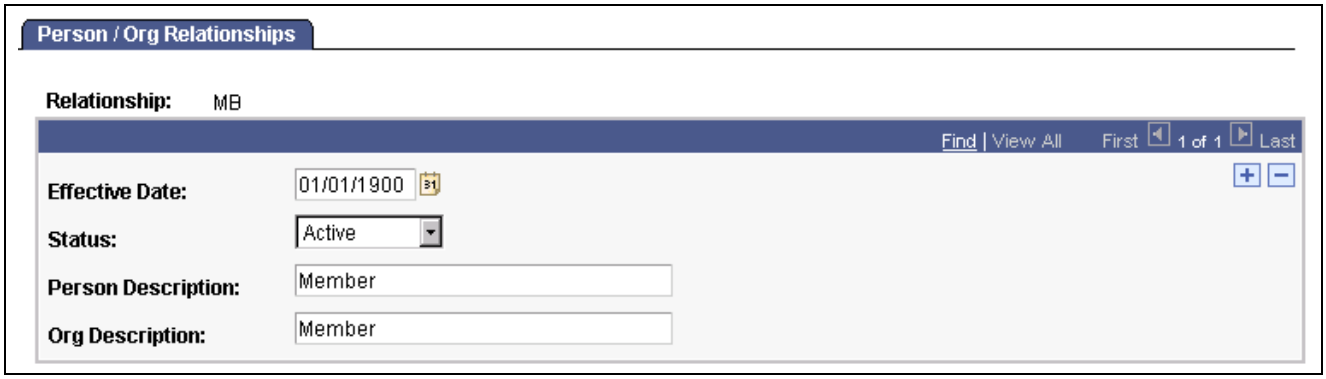
This section discusses how to define person and organization relationships.

Page Used to Define Person and Organization Relationships

Page Name	Object Name	Navigation	Usage
Person/Org Relationships	AV_PE_RELATION_TBL	Set Up SACR, Product Related, Contributor Relations, Constituent Information, Person/Org Relationships	Define the relationships that can exist between people and organizations in the system.

Defining Person/Org Relationships Values

Access the Person/Org Relationships page.



Person/Org Relationships setup page

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

Org Description Enter the relationship that the organization has with the person. For example, if you are defining a relationship between a trustee and a foundation, the description of the organization that you enter is *Trustee.*

Note. Because the relationship always depicts the person's role in relation to the organization, the setup values on this page should always reflect the person's relationship type for both person and organization. Using this convention, regardless of whether you are reviewing the person's or the organization's record, you will understand the relationship that the person has to that organization.

Defining Organization Reciprocal Relationships

To set up organization reciprocal relationships, use the Org Reciprocal Relationships component (AV_ORG_RELATE_TBL).

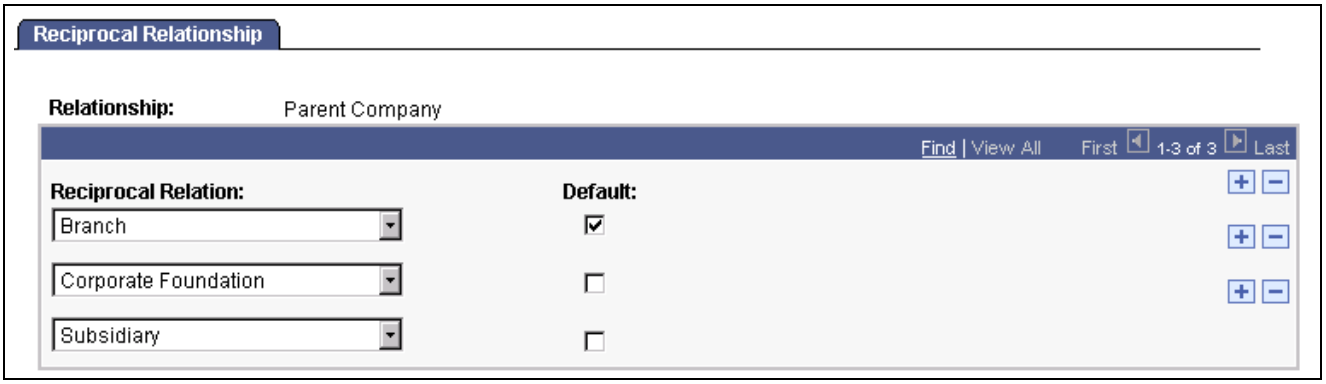
This section discusses how to define organization reciprocal relationships.

Page Used to Define Organization Reciprocal Relationships

Page Name	Object Name	Navigation	Usage
Reciprocal Relationship	AV_ORG_RELATE_TBL	Set Up SACR, Product Related, Contributor Relations, Constituent Information, Org Reciprocal Relationships	Set up the valid reciprocal relationships that you can create when you establish relationships between organizations.

Setting Reciprocal Relationship Values

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 that appears by 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 Enterprise Campus Community Fundamentals 8.9 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.

Prerequisites

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

- 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

To set up prospect identifiers, use these components: Asset Types (AV_ASSET_TBL), Rating Types (AV_R_TYPE_TBL), Rating Categories (AV_R_CAT_TBL), Rating Indicators (AV_R_IND_TBL), Action Types (AV_ACTN_TYPE_TBL), Action Contact Types (AV_ACTN_CNTC_TBL), Action Status Codes (AV_ACTN_STAT_TBL), Action Results (AV_ACTN_RSLT_TBL), Appreciation Items (AV_ITEM_TBL), Trust Categories (AV_TRUST_C_TBL), Trust Terms (AV_TRUST_R_TBL), Trust Types (AV_TRUST_T_TBL).

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.

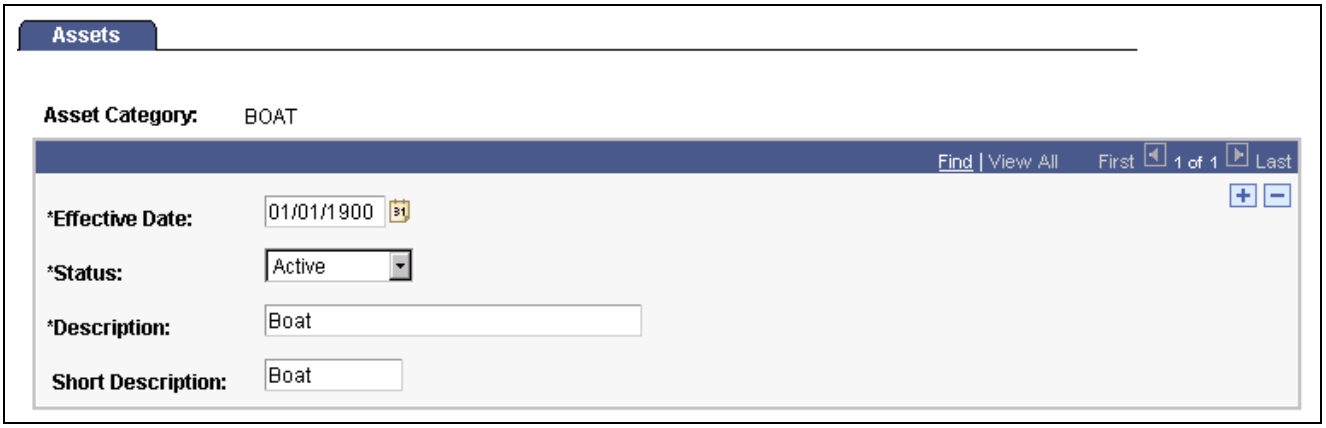
Pages Used to Set Up Prospect Identifiers

Page Name	Object Name	Navigation	Usage
Assets	AV_ASSET_TBL	Set Up SACR, Product Related, Contributor Relations, Prospect Management, Asset Types	Define the types of assets that your institution tracks.
Rating Type	AV_R_TYPE_TBL	Set Up SACR, Product Related, Contributor Relations, Prospect Management, Rating Type	Define the valid rating types to track.
Rating Categories	AV_R_CAT_TBL	Set Up SACR, Product Related, Contributor Relations, Prospect Management, Rating Categories	Define the types of prospect ratings to track.
Rating Indicators	AV_R_IND_TBL	Set Up SACR, Product Related, Contributor Relations, Prospect Management, Rating Indicators	Define the indicators that you use to measure a constituent's rating.
Action Types	AV_ACTN_TYPE_TBL	Set Up SACR, Product Related, Contributor Relations, CR Common Definitions, Action Types	Define the action types that your institution uses.
Action Contact Type	AV_ACTN_CNTC_TBL	Set Up SACR, Product Related, Contributor Relations, CR Common Definitions, Action Contact Types	Define the valid contact types for actions or volunteer assignments.
Action Status Codes	AV_ACTN_STAT_TBL	Set Up SACR, Product Related, Contributor Relations, CR Common Definitions, Action Status Codes	Define the valid statuses for prospect actions.
Action Results	AV_ACTN_RSLT_TBL	Set Up SACR, Product Related, Contributor Relations, CR Common Definitions, Action Results	Define the valid results for actions.

Page Name	Object Name	Navigation	Usage
Donor Appreciation Items	AV_ITEM_TBL	• Set Up SACR, Product Related, Contributor Relations, CR Common Definitions, Appreciation Items • Set Up SACR, Product Related, Contributor Relations, Prospect Management, Appreciation Items	Define the various items of appreciation that constituents receive throughout the cultivation and membership process.
Trust Types	AV_TRUST_T_TBL	Set Up SACR, Product Related, Contributor Relations, Prospect Management, Trust Types	Define the valid types of trusts at your institution.
Trust Categories	AV_TRUST_C_TBL	Set Up SACR, Product Related, Contributor Relations, Prospect Management, Trust Categories	Define the valid categories for trusts at your institution.
Trust Terms	AV_TRUST_R_TBL	Set Up SACR, Product Related, Contributor Relations, Prospect Management, Trust Terms	Define the valid terms for trusts at your institution.

Defining Asset Types

Access the Assets page.



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.

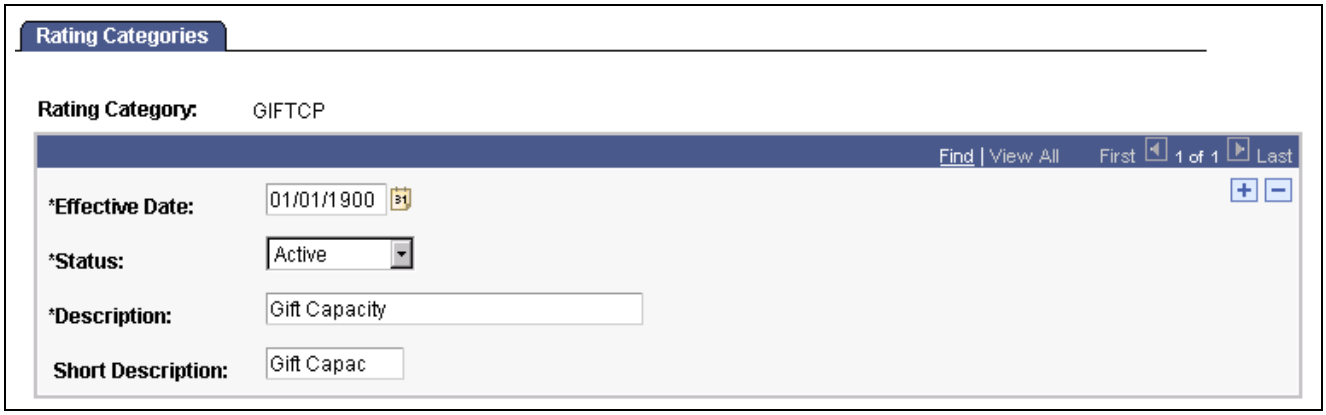


Rating Types page

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 an institution purchases census information from an outside party, the rating type that is associated with those ratings would probably be *Vendor* because the information comes from an outside source.

Defining Rating Categories

Access the Rating Categories page.



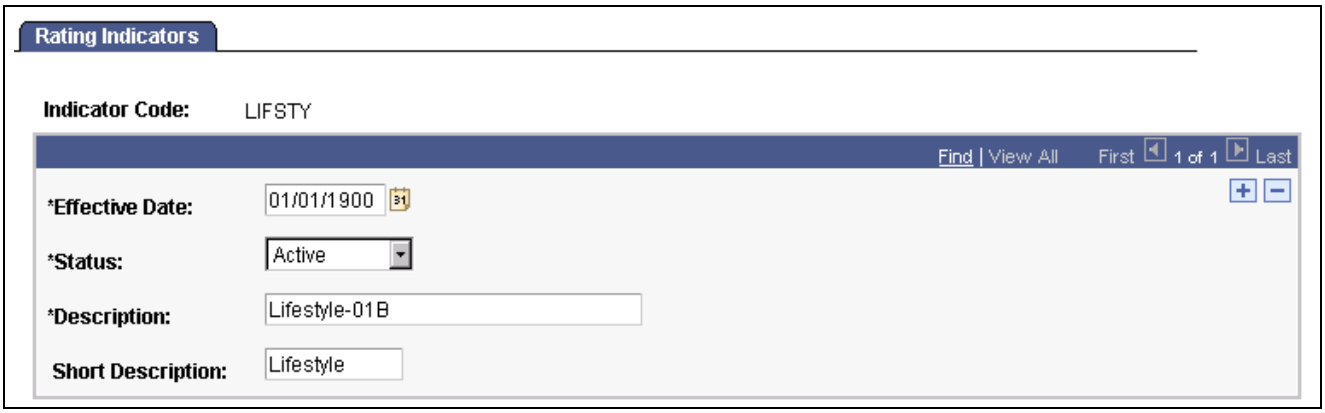
Rating Categories page

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. You 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.



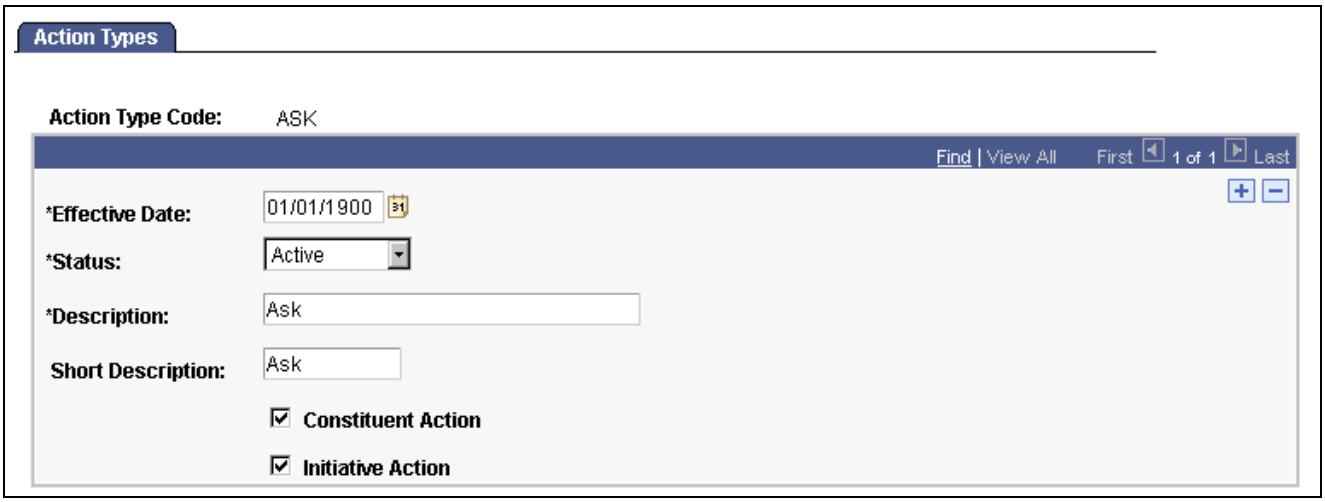
Rating Indicators page

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 *75,000–100,000 for Household Income, Lifestyle-01B for a vendor rating,* and *25,000+ for Giving Capacity.*

Defining Action Types

Access the Action Types page.



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.

Action Type Required Values

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

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.

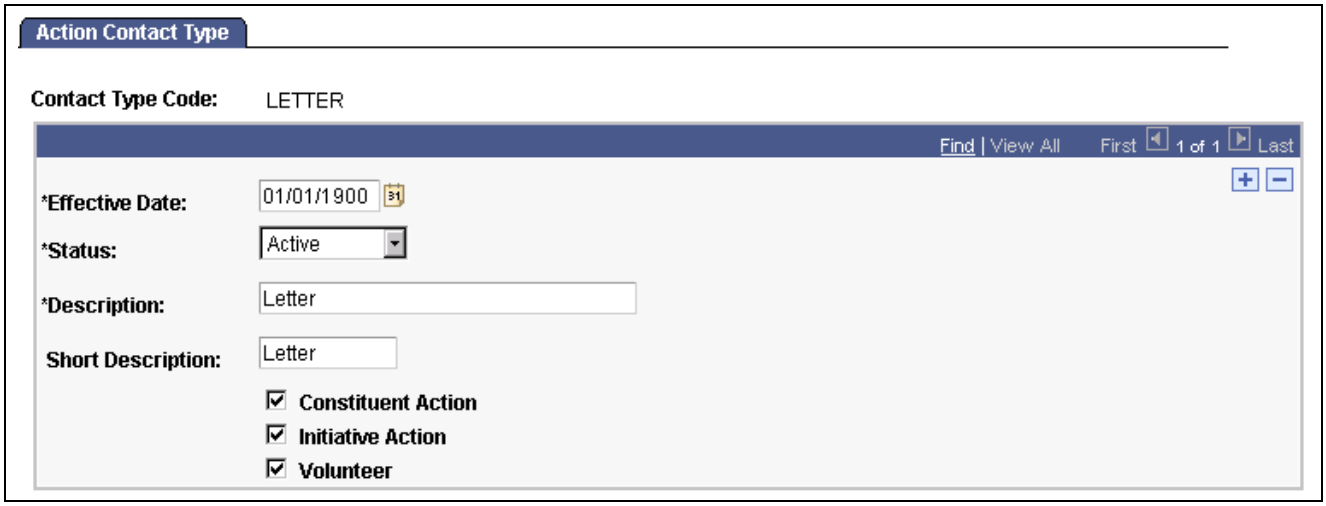
Constituent Action Select if the action type applies to actions that are associated with prospects or constituents.

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

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

Defining Action Contact Types

Access the Action Contact Type page.



Action Contact Type page

When you create an action or a volunteer assignment in 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. For the purpose of managing prospects, a contact type could be a personal visit. For the purpose of 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, which you use when creating an action or a volunteer assignment.

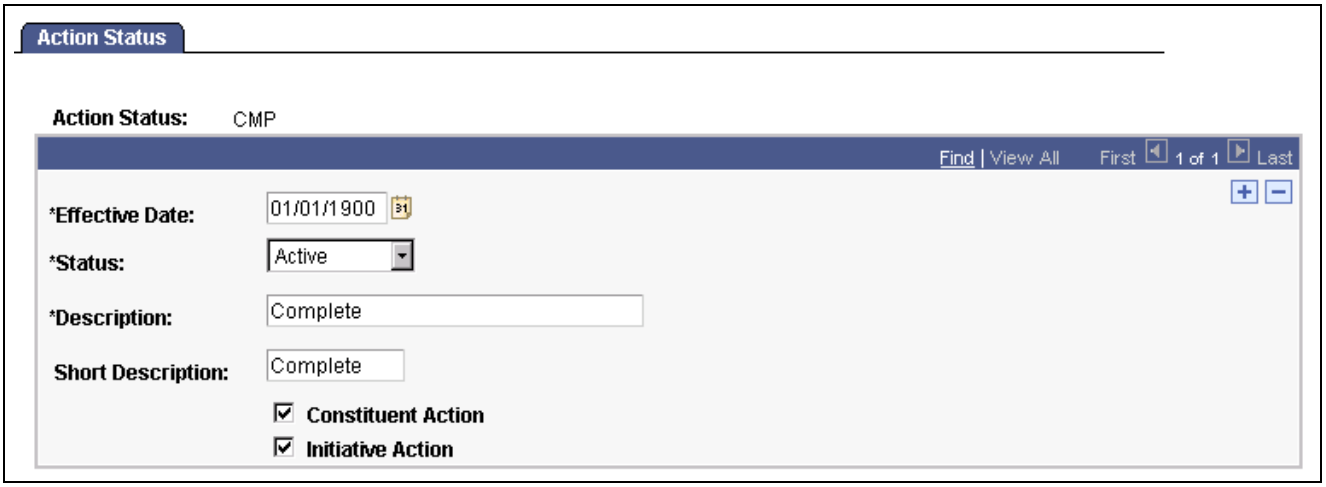
Constituent Action Select if the contact type applies to prospect actions.

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 that you make on this page determine the values in the Action Status field on the Prospect Action page, which you use when creating an action.

Action Status Codes Required Values

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

Code	Value
CMP	*Complete*
SCH	*Scheduled*

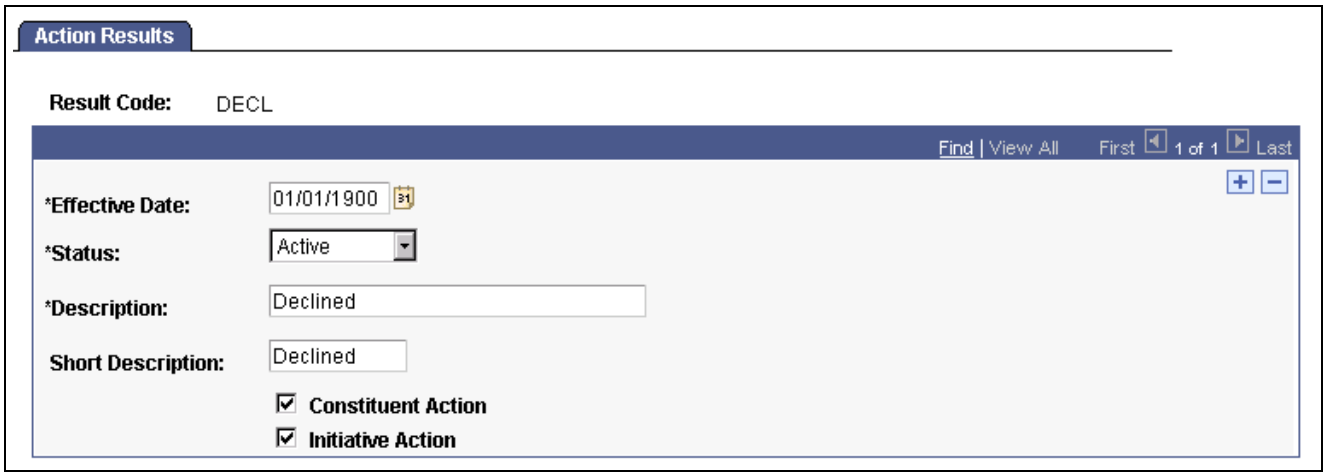
Constituent Action Select if the action status applies to prospect actions.

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

Examples of action status include scheduled, on hold, and suspended.

Defining Action Results

Access the Action Results page.



Action Results page

The selections that you make on this page determine the values in the Result field on the Action Results page (Contributor Relations, Prospect Management, Stewardship Plans, Constituent Actions, Actions-Person (or Actions-Org), Action Results tab, or Self Service, Outreach, My Prospects, My Stewardship Plans, Complete an Action) used when completing a prospect action.

Constituent Action Select if the action result applies to prospect actions. Examples include accepted, proposal presented, gift, pledge, and declined.

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

Action Results Required Values

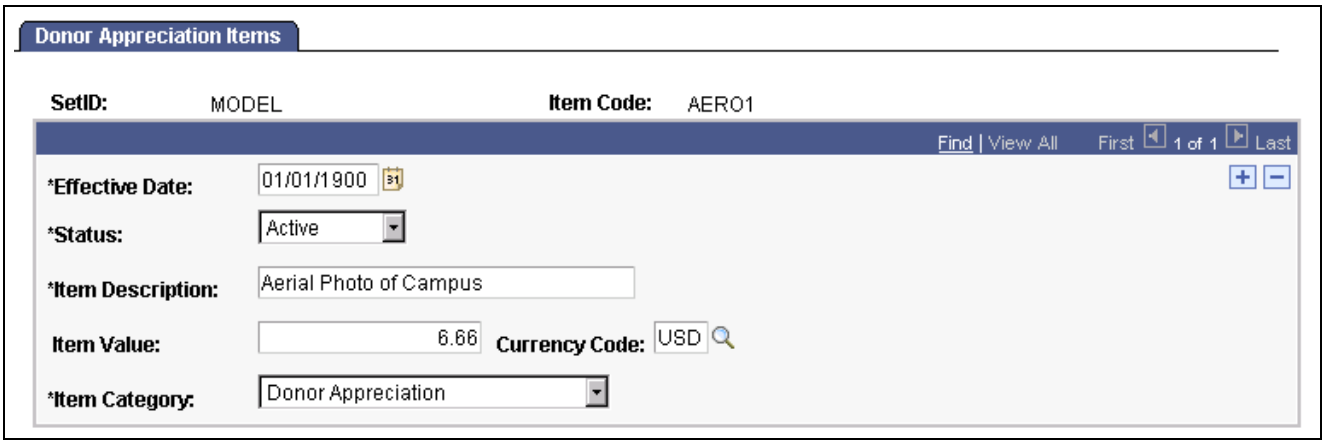
The following values are required in the ACTN_RSLT_CD field that resides in the AV_ACTN_RSLT_TBL table:

Code	Value
DECL	*Declined*
GIFT	*Gift*
PLEDGE	*Pledge*

Note. Use the ACTN_RSLT_CD field for reporting action results in the Campaign Progress report.

Defining Donor Appreciation Items

Access the Donor Appreciation Items page.



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 might differ in look and cost, depending on the location that distributes it.

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

Item Category

Select the item category to indicate whether the item is distributed for donor appreciation or as a membership benefit. 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 different codes so that it appears correctly as an available option.

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.
- Set up campaigns.
- Set up membership initiatives.
- Set up volunteer efforts.
- Set up event initiatives.

See Also

Chapter 11, "Managing Initiatives," page 227

Understanding Initiatives

This section lists prerequisites and discusses initiatives in general, as well as specific initiative types.

Prerequisites

In general, before you set up initiatives in the system, consider these questions:

- What type of goals does the institution track for initiatives?

  Goal types will differ, depending on the initiative type, but may be 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 the institution runs?

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

- What communication methods do you use to evoke participation in the 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 constituents during initiatives?

  Appeal types are categories of appeals such as direct mail, phonathons, and personal solicitations. What specific appeals does the 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 the 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 the 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 the initiative staff engages 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 does your staff have with constituents, and for what purposes?

  Create a spreadsheet of all four action components.

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

  Much setup is necessary to produce communications from the system that are tailored to the company's needs. Communications is part of PeopleSoft Enterprise 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.

In addition to the questions above, which are prerequisites for setting up any type of initiative, you should consider additional questions for each major type of initiative.

Before you set up the system to manage a campaign, consider this question: What phases, such as leadership gifts, major gifts, and general campaign gifts, do your campaigns encompass?

Before you set up the system to manage memberships, consider these questions:

- How are setIDs, 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 that you see depend upon the values that you define for the setID and the setID that you associate with the AV01_MBR record group.

  See *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook*, "Securing Contributor Relations," Defining and Securing PeopleSoft Enterprise Contributor Relations Business Units and SetIDs.

- Does your institution allow gift entry to be completed when membership dues are processed?

  You specify this information 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?

  You specify this information on the Institution Installation page.

- What types 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.

Before you set up the system to manage volunteers, consider the following:

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

  Examples of volunteer appeals are an invitation to participate in a career network or a request to help with the annual alumni phonathon. Create a spreadsheet of each appeal and its type. You can link appeals to all types of initiatives.

- What responsibilities does your institution assign to volunteers?

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

- What areas of responsibility do you want to categorize?

  For instance, event logistics might be an assignment type that comprises 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.*

Before you set up the system to manage events, consider this question: What phases do your event initiatives encompass?

Understanding General Initiatives

When developing a strategic plan for 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.

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 the institution.
- Develop a communications or public relations plan to reach the target audiences.

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 the institution to reach both existing and new constituents.

Understanding Campaigns

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. Although all initiatives in 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.

Understanding Membership Initiatives

A membership initiative is a campaign focused primarily on membership. Although all initiatives in 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.

Understanding Volunteer Efforts

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. Volunteer efforts are associated with both volunteer initiatives and member organizations, and are set up as initiatives. Although all initiatives in 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; overview information for all types of initiatives is discussed elsewhere in this PeopleBook.

Understanding Event Initiatives

An event initiative is any occurrence that you set up to achieve a particular result. It is a combination of processes. Events are one of the most effective ways for the institution to reach both existing and new constituents.

Although all initiatives in 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; overview information applicable to all initiatives is located elsewhere in this PeopleBook.

Understanding Other Initiatives

Other-type initiatives refer to initiatives that do not fall within the boundaries of a campaign, event initiative, membership initiative, or volunteer effort. Although all initiatives in Contributor Relations share some common setup pages, other-type initiatives have their own audiences, resources, related initiatives, and PR plans. Setup information applicable to all initiatives is located elsewhere in this PeopleBook.

Defining Initiative Types

To set up initiative types, use the Initiative Type Table component (AV_INTV_TYPE_TABLE).

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

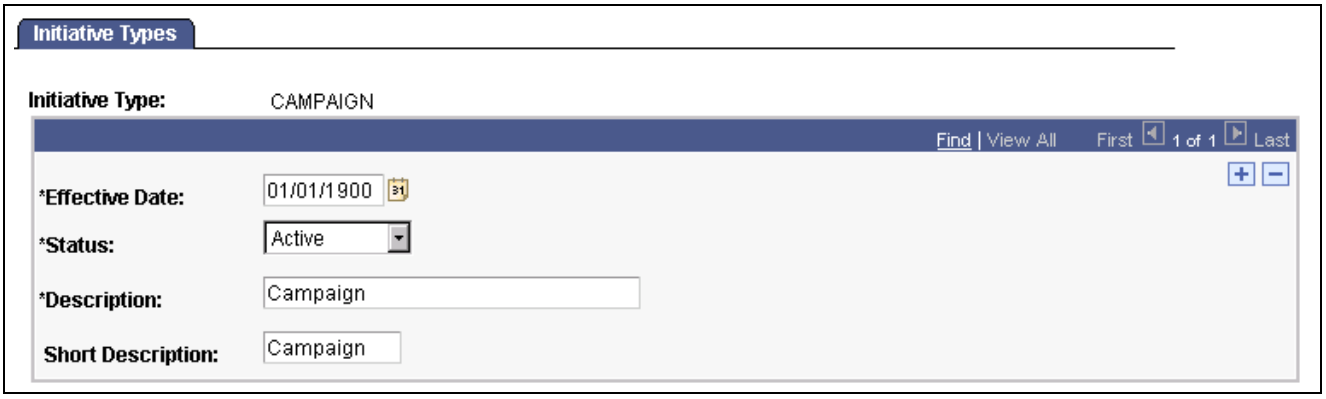
This section discusses how to define initiative types.

Page Used to Define Initiative Types

Page Name	Object Name	Navigation	Usage
Initiative Types	AV_INTV_TYPE_TABLE	Set Up SACR, Product Related, Contributor Relations, Initiatives, Initiative Type Table	Define institution-specific initiative types.

Defining Initiative Types

Access the Initiative Types page.



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*.

Initiative Type Required Values

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

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

To set up audiences, use the Attribute Type component (AV_ATTR_TYP), and the Audience Criteria component (AV_AUD_CRIT).

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

This section discusses how to:

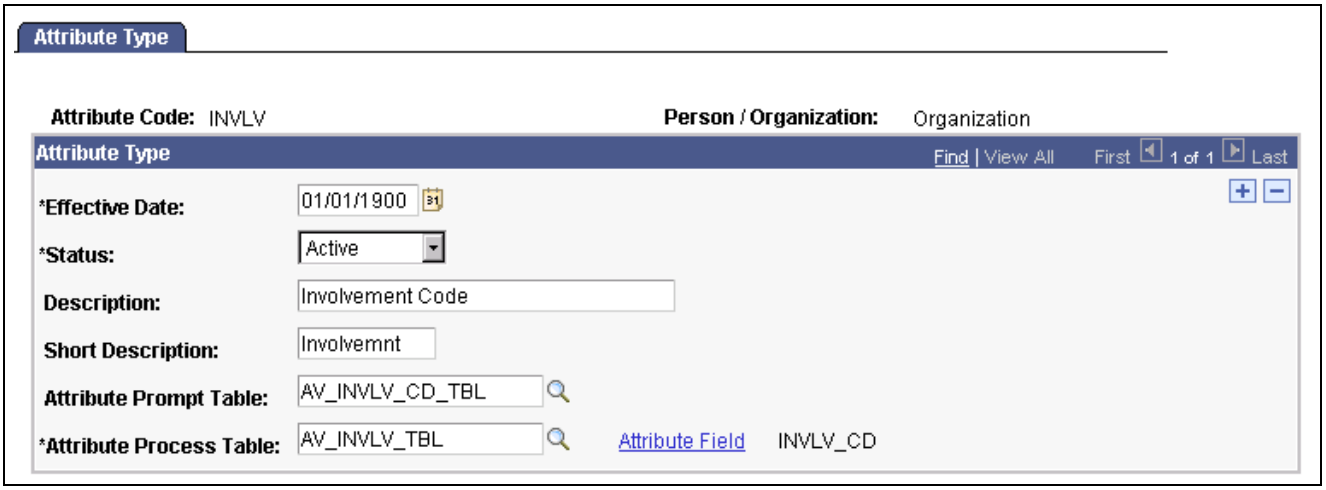
- Set up attribute types.
- Set up audience criteria.

Pages Used to Define Audiences

Page Name	Object Name	Navigation	Usage
Attribute Type	AV_ATTR_TYP_TBL	Set Up SACR, Product Related, Contributor Relations, Initiatives, 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	Set Up SACR, Product Related, Contributor Relations, Initiatives, 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 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 or view 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. System 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 Click this link to select the actual field in the process table where the attribute resides on a constituent's record.

The system supports these types and lengths of fields for attribute types:

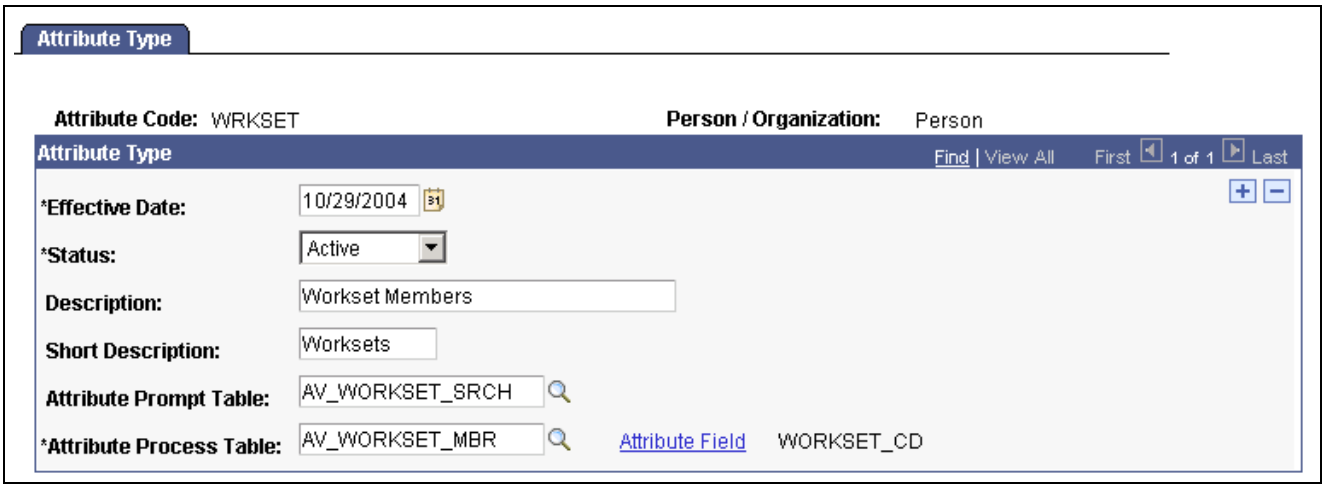
Type	Maximum Field Length
Character	15
Number	10
Signed Number (decimal fields)	12.2
Date	10

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 COBOL process (AVPINT), which retrieves the attributes that you select. You can access the Initiative Audience Build page to run this process.

Example

To maximize the potential of audience attributes, a view could be created for all mailable alumni by selecting people who have constituent types of 1 and 2, an active address, and no date of death. By using this view as the first row in an audience criteria record, multiple tables are combined in a single view, leaving five more rows in audience criteria to narrow the audience selection.

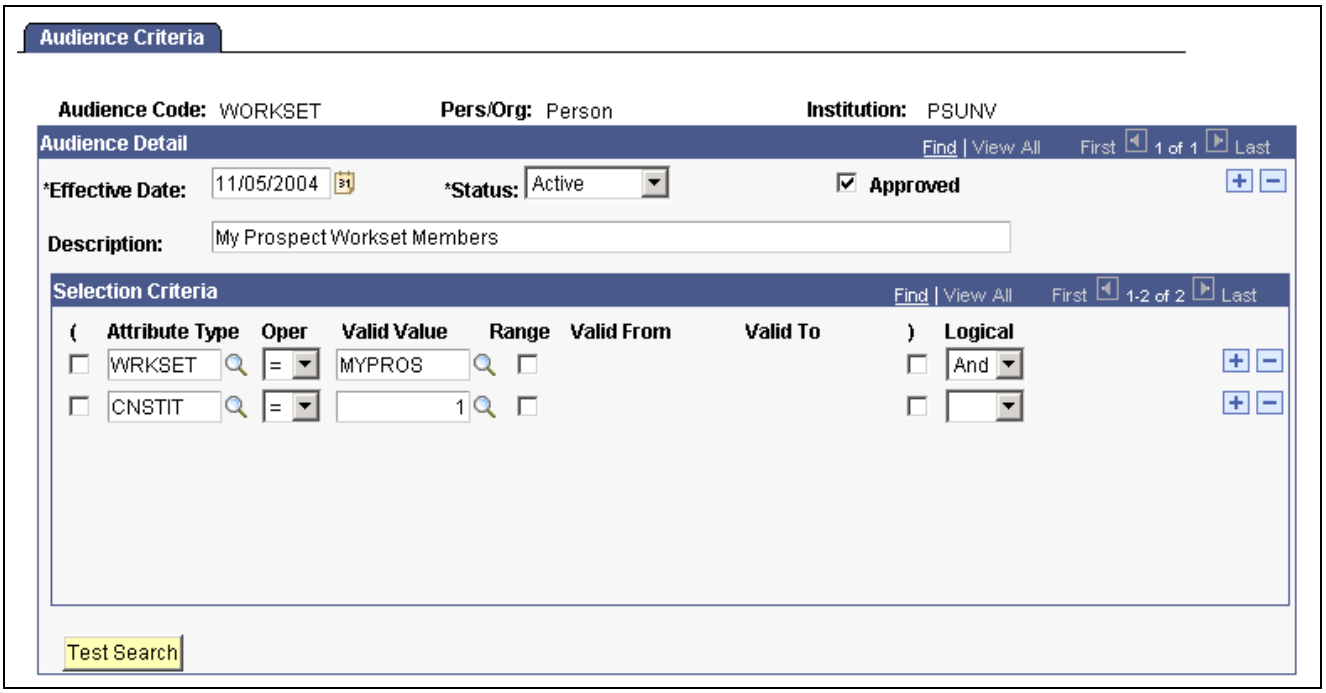
Another way to maximize audience attributes is to create worksets and use the AV_WORKSET_MBR record as the process table to select members into an audience.



Selecting workset members into an audience

Setting Up Audience Criteria

Access the Audience Criteria page.



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 member organization, if you selected the Approved check box.

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 the 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.

The 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 50.

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. A single criterion can be based on a view that combines multiple attributes in a single view. For example, mailable alumni could be based on a process view that combines constituents with a constituent type of 1 or 2 who have active addresses and do not have a date of death. Further, other views combining multiple process tables can be used in the additional five criteria rows to expand the selection ability of the audience process.

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 the first row of criteria and included an attribute from the Ethnicity table, then the result would include anyone in the Involvement table who also matched the ethnicity type in the second row of criteria. 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

To set up goal types, use the Goal Type Table component (AV_GOAL_TYPE_TABLE).

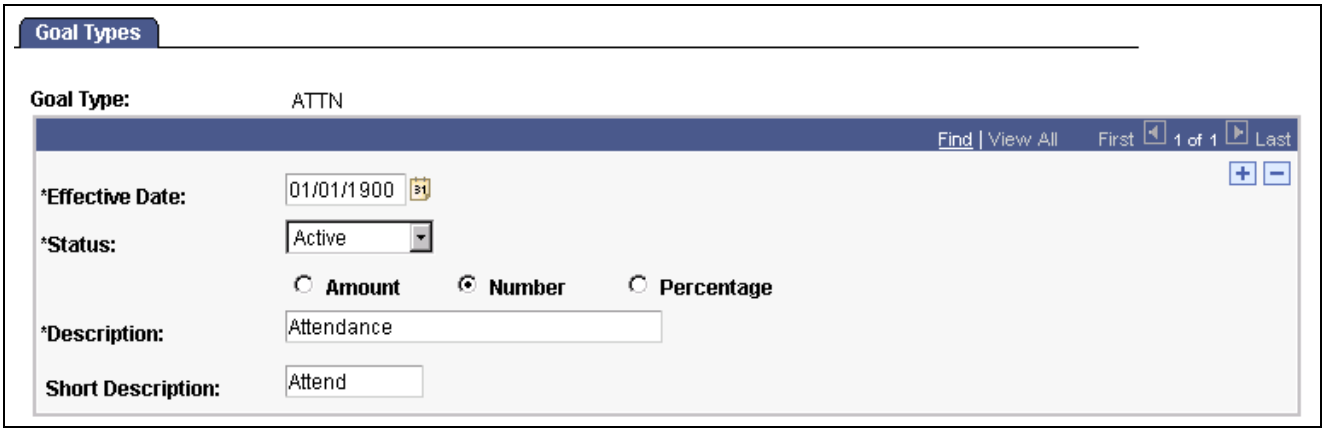
This section discusses how to define goal types for the initiative.

Page Used to Define Initiative Goal Types

Page Name	Object Name	Navigation	Usage
Goal Types	AV_GOAL_TYPE_TABLE	Set Up SACR, Product Related, Contributor Relations, Initiatives, Goal Type Table	Define the types of goals that the institution tracks.

Defining Goal Types

Access the Goal Types page.



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

To set up methods, use the Method Table component (AV_METHOD_TABLE).

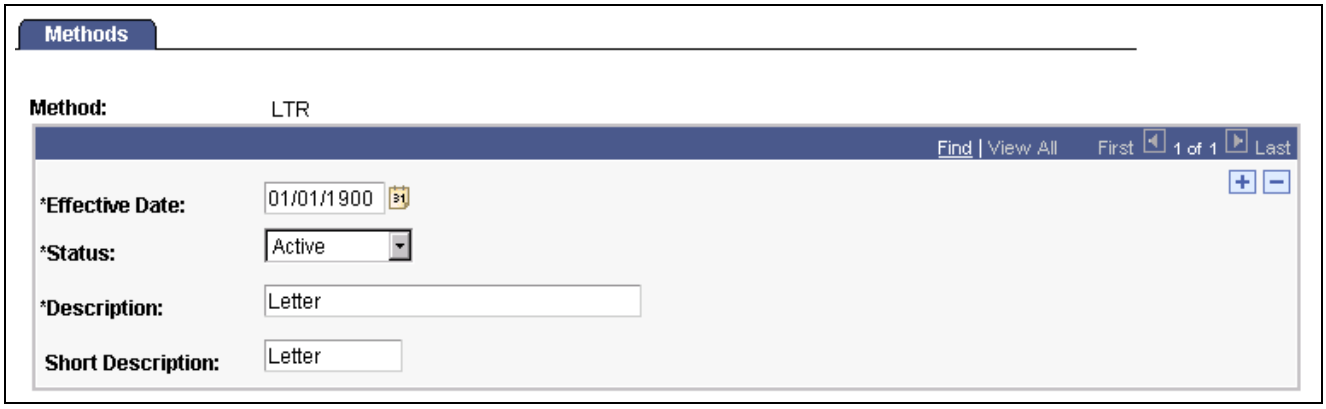
This section discusses how to define communication vehicles that are used to distribute public relations plans.

Page Used to Define Methods

Page Name	Object Name	Navigation	Usage
Methods	AV_METHOD_TABLE	Set Up SACR, Product Related, Contributor Relations, Initiatives, Method Table	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 page

Using Action Components for Initiative Setup

The Prospect Management feature in 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 39.

Defining Action Contact Types for Initiatives

Use the Action Contact Types page to define the actions that the 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 40.

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 41.

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 41.

Defining Budget Categories

To set up budget categories, use the Budget Table component (AV_BUDGET_TABLE).

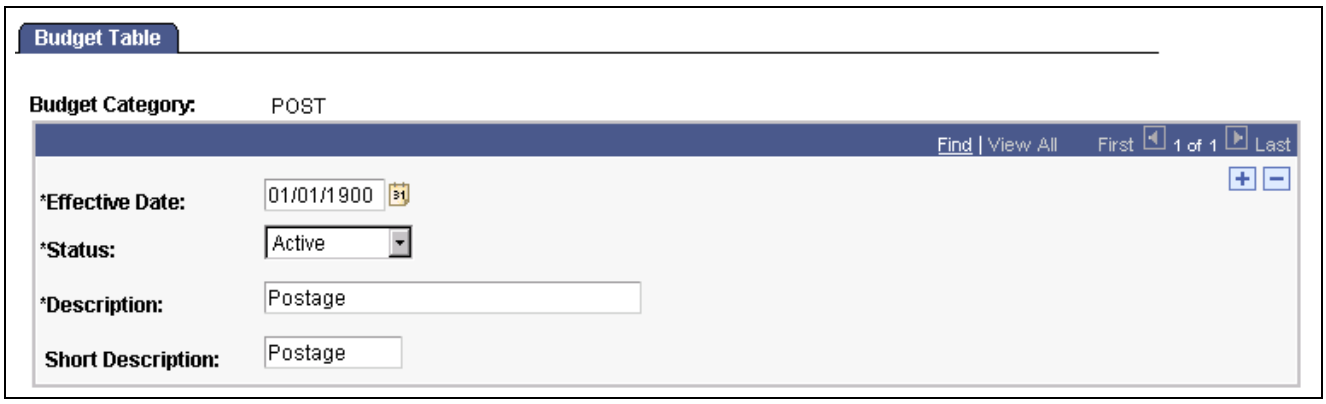
This section discusses how to define the valid categories within an initiative budget.

Page Used to Define Budget Categories

Page Name	Object Name	Navigation	Usage
Budget Table	AV_BUDGET_TABLE	Set Up SACR, Product Related, Contributor Relations, Initiatives, Budget Table	Define the categories within an initiative budget.

Setting Up Budget Categories

Access the Budget Table page.



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

To set up appeals, use the Appeal Type Table component (AV_APPEAL_TYPE_TBL) and the Appeal Code Table component (AV_MTVTN_TBL).

This section discusses how to:

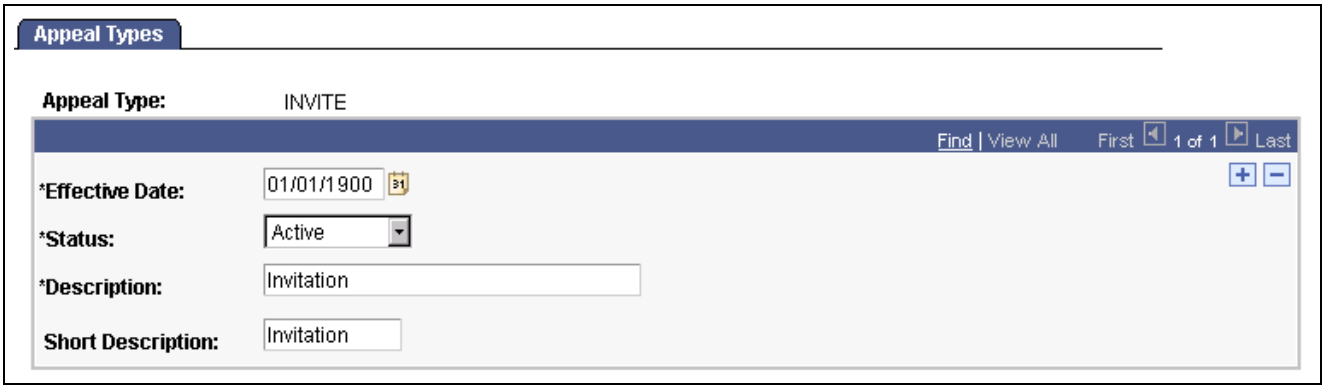
- Set up appeal types.
- Set up appeals.
- Set up appeal details.

Pages Used to Set Up Appeal Information

Page Name	Object Name	Navigation	Usage
Appeal Types	AV_APPEAL_TYPE_TBL	Set Up SACR, Product Related, Contributor Relations, Initiatives, Appeal Type Table	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.
Appeal	AV_MTVTN_TBL	Set Up SACR, Product Related, Contributor Relations, Initiatives, Appeal Code Table	Set up appeals or specific activities that generate commitments at the institution.
Appeal Detail	AV_MTVTN2_TBL	Set Up SACR, Product Related, Contributor Relations, Initiatives, Appeal Code Table, Appeal Detail	Set up appeal details by defining the expected results and benefits for particular appeals.

Setting Up Appeal Types

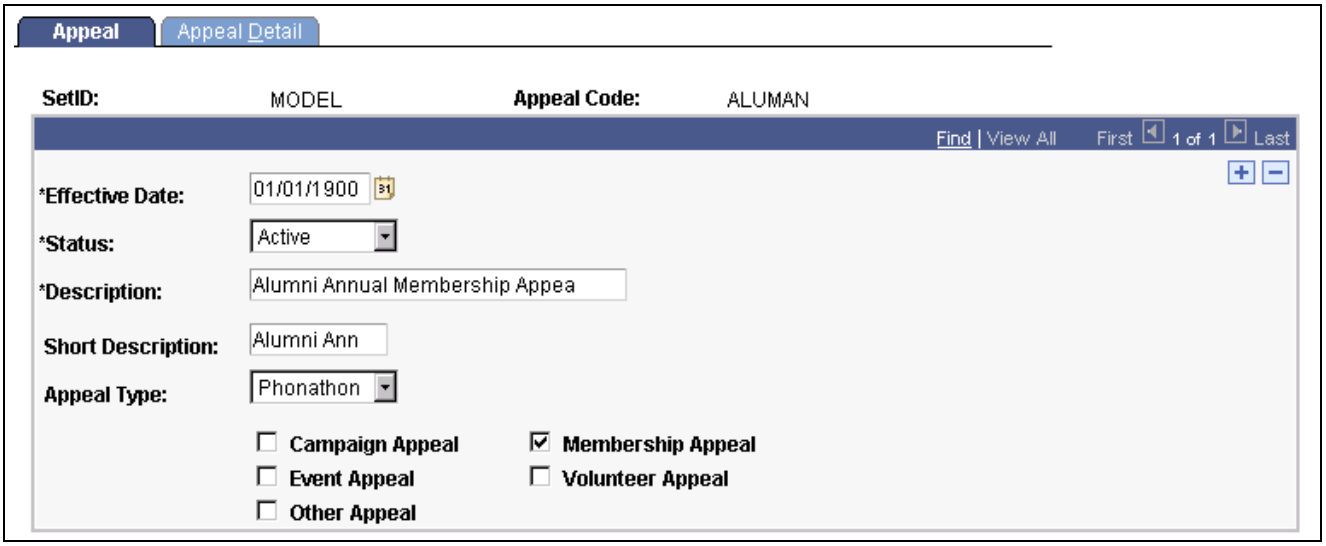
Access the Appeal Types page.



Appeal Types page

Setting Up Appeals

Access the Appeal page.



Appeal page

Examples of appeals are an 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.

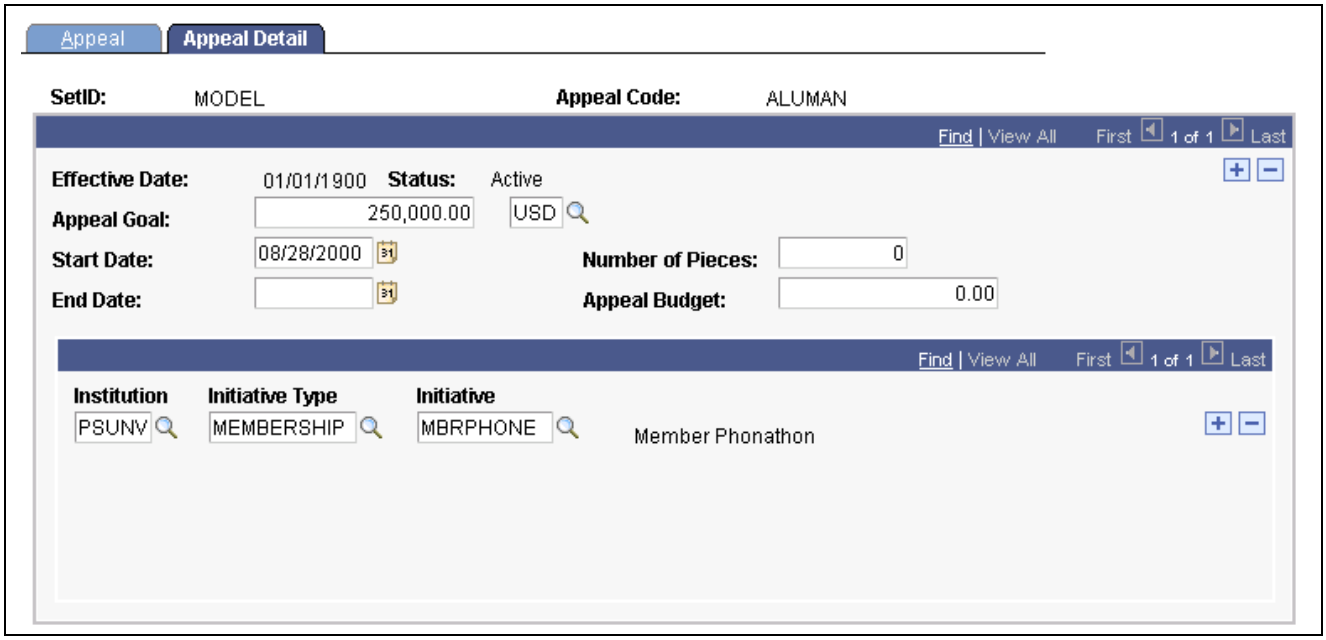
Other Appeal Select to indicate that this appeal is an other appeal.

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 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 the 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.

Setting Up Campaigns

To set up campaigns, use the Campaign Donor Phase Table component (AV_DONOR_PHASE_TBL).

This section discusses how to:

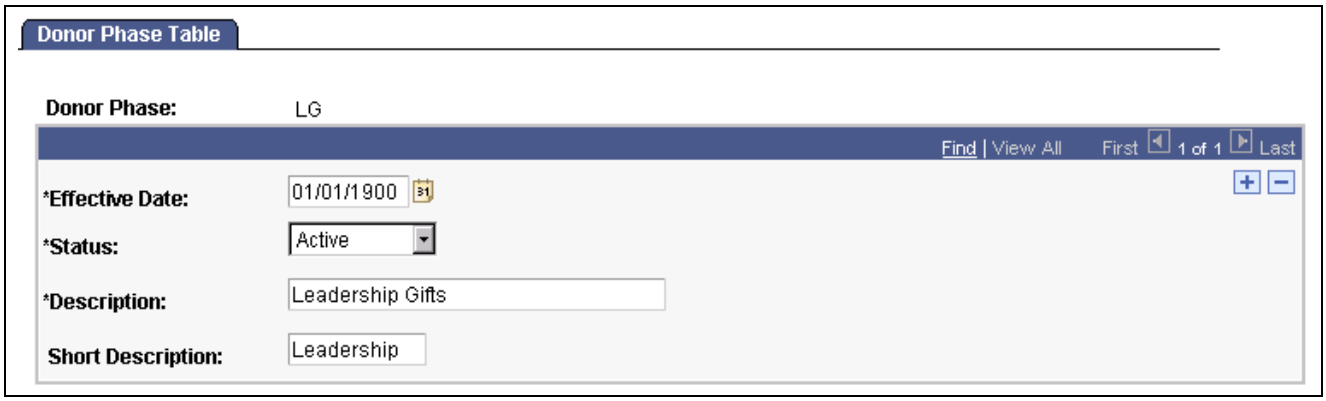
- Define donor phases.
- Set up an anticipated gift table.
- Define reporting rules.

Pages Used to Set Up Campaigns

Page Name	Object Name	Navigation	Usage
Campaign Donor Phase Table	AV_DONOR_PHASE_TBL	Set Up SACR, Product Related, Contributor Relations, Initiatives, Campaign Donor Phase Table	Define the valid donor phases used to create gift tables for campaigns at an institution. Phases identify the various gift (such as major gifts or leadership gifts) levels that you track.
Gift Table	AV_CMPGN_GIFT_TBL	Contributor Relations, Initiatives, Campaign Initiatives, Manage Campaigns, Gift Table	Estimate the number of donors and prospects that you need at each gift level to reach a campaign goal.
Reporting Rules	AV_CAMPAIGN_TABLE	Contributor Relations, Initiatives, Campaign Initiatives, Manage Campaigns, Reporting Rules	Define the rules used in reporting campaign activity to the Council for the Advancement and Support of Education (CASE). Rules can vary from campaign to campaign, but cannot vary within a single campaign. After a campaign initiative is approved, the rules that you define cannot be altered. You use the approval process when you print the CASE campaign report.

Defining Donor Phases

Access the Donor Phase Table page.

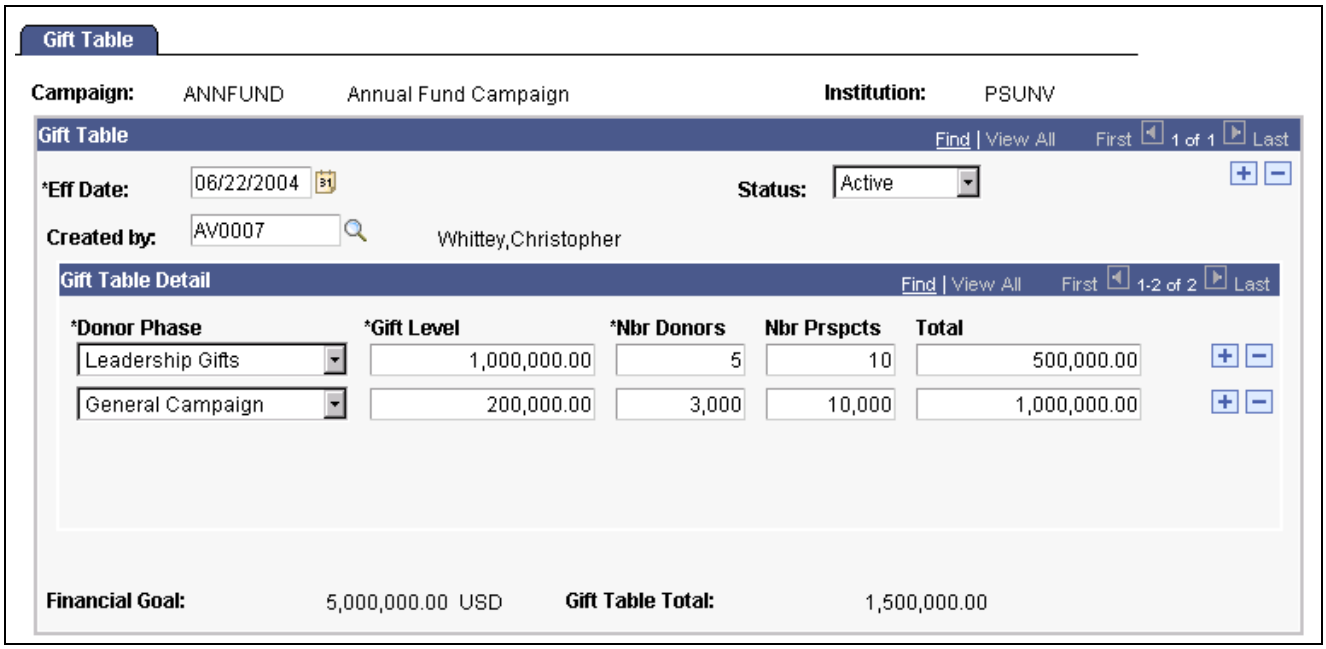


Donor Phase Table page

After you define donor phases, you can use them in the Gift Table page.

Setting Up an Anticipated Gift Table

Access the Gift Table page.



Gift Table page

Created By — Select the ID number of the person creating the gift table. The default value is the ID of the person entering the gift table information but can be overridden.

Donor Phase — Select which section of the campaign, such as *Major Gifts, Leadership Gifts, Special Gifts,* or *General Campaign* is being defined in the gift table. 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.

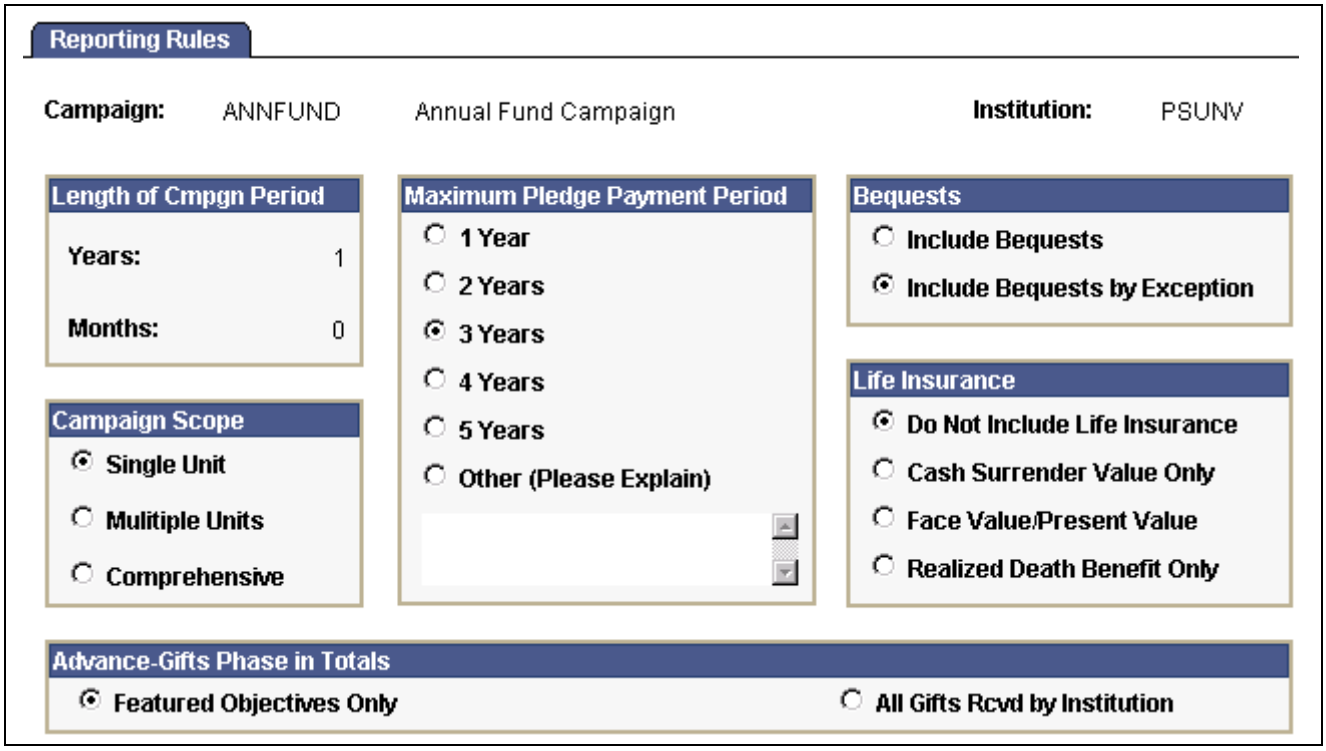
Example

This is an example of a standard gift table for a 25,000,000 USD campaign:

Phase	Gift Level (USD)	Nbr Donors	Nbr Prosp	Total (USD)
Major Gifts	2,500,000	1	5	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
	50	33,000	60,000	2,200,000
Total		35,799	66,650	25,000,000

Defining Reporting Rules

Access the Reporting Rules page.



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; it does not affect the data that you view on inquiry pages throughout the 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.

Maximum Pledge Payment Period

This selection indicates an 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 that meet 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 the 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 the 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.

Advance-Gifts Phase in Totals

Featured Objectives Only Select this option to include in campaign totals only those gifts received by the 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 the institution during the specified campaign period.

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

Setting Up Membership Initiatives

To set up membership initiatives, use the Membership Type component (AV_MBR_TYP) and the Membership Category component (AV_MBR_CAT).

This section discusses how to:

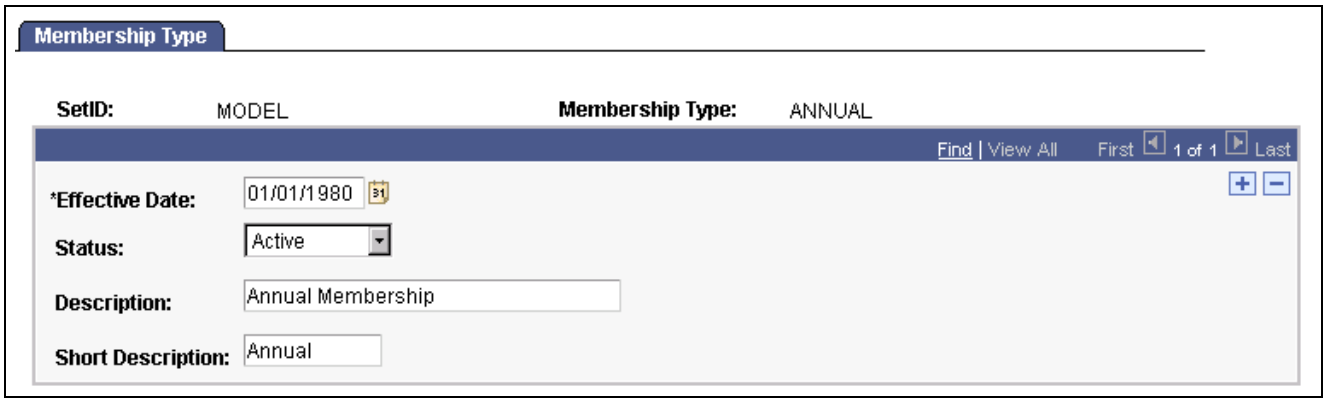
- Set up membership types.
- Set up membership categories.

Pages Used to Set Up Membership Initiatives

Page Name	Object Name	Navigation	Usage
Membership Type	AV_MBR_TYP_PNL	Set Up SACR, Product Related, Contributor Relations, Membership Organizations, Membership Type	Define the various types of memberships that constituents can have with a member organization.
Membership Category	AV_MBR_CAT_PNL	Set Up SACR, Product Related, Contributor Relations, Membership Organizations, Membership Category	Define the various classifications for membership in an organization.

Setting Up Membership Types

Access the Membership Type page.



Membership Type page

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

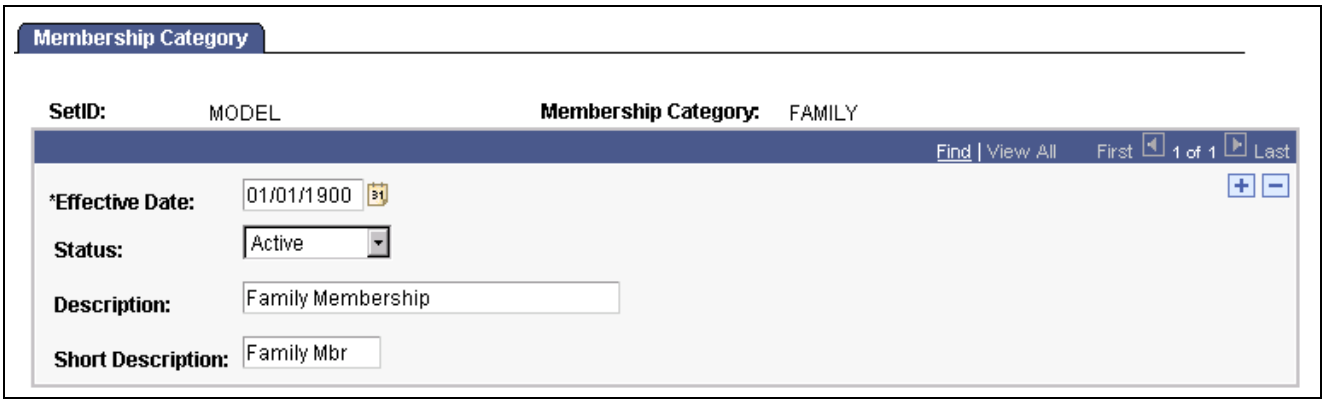
Membership Type Required Values

The following table describes the values that are required:

Code	Value
LIFE	Life

Setting Up Membership Categories

Access the Membership Category page.



Membership Category page

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

Setting Up Volunteer Efforts

To set up volunteer efforts, use the Areas of Responsibility component (AV_AREA_TYP_TBL), Assignment Types component (AV_ASGN_TYP_TBL), and the Leadership Types component (AV_LDR_TYPE_TBL).

This section discusses how to:

- Set up volunteer resources.
- Define areas of responsibility.
- Define assignment types.
- Define leadership types.
- Define volunteer initiative goals.
- Structure a leadership group.
- Define subgroups.

Common Elements Used in This Section

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 that you selected.

Term Length Select the expected length of service for volunteers serving in this capacity. The values *Less Than One Year* and *1-15 Years* are delivered with the system. The default value for this field is *Less Than One Year.*

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

Selection Process Indicate whether volunteers are elected or appointed to the position. This default value for this field is *Appointed.*

Required Specify whether the position must be filled. You can enter two lines for each role; one for the number of required positions and one for the number of additional positions that can be filled.

Pages Used to Set Up Volunteer Efforts

Page Name	Object Name	Navigation	Usage
Area of Responsibility	AV_AREA_TYP_TBL	Set Up SACR, Product Related, Contributor Relations, Initiatives, CR Volunteers, Areas of Responsibility	Define the valid areas of accountability assigned to volunteers.
Assignment Type	AV_ASGN_TYP_TBL	Set Up SACR, Product Related, Contributor Relations, Initiatives, CR Volunteers, Assignment Types	Define the valid types of volunteer assignments.
Leadership Types	AV_LDR_TYPE_TBL	Set Up SACR, Product Related, Contributor Relations, Initiatives, CR Volunteers, 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.
Volunteer Goals	AV_INTV_VOL_GOAL	Contributor Relations, Initiatives, Volunteer Initiatives, Manage Volunteer Initiatives, Volunteer Goals	Set up intermediate goals or milestones for an initiative.
Volunteer Structure	AV_VOL_LDR_GRP, AV_VOL_LDR_GRP_M	• Contributor Relations, Initiatives, Volunteer Initiatives, Initiative Volunteers, Initiative Volunteer Structure • Contributor Relations, Initiatives, Volunteer Initiatives, Membership Org Volunteers, Member Org Volunteer Structure	Define the overall leadership group for an initiative or a member organization.
Sub-Groups	AV_VOL_SUB_GRP	• Contributor Relations, Initiatives, Volunteer Initiatives, Initiative Volunteers, Initiative Volunteer Sub-Group • Contributor Relations, Initiatives, Volunteer Initiatives, Membership Org Volunteers, Member Org Volunteer Sub-Group	Define a group of volunteers who report to the leadership group within the volunteer structure. Subgroups can be committees or specific individuals.

Setting Up Volunteer Resources

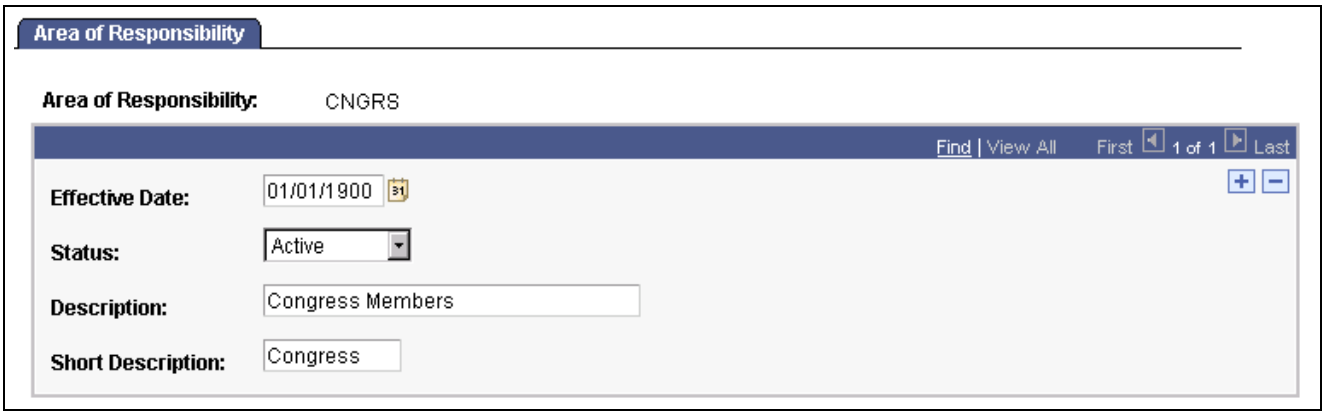
Use the Define Volunteers, Roles, and Volunteer Roles pages to create the volunteer resources that you require when managing volunteer efforts.

See Also

Chapter 14, "Managing Volunteers," Assigning Volunteers to Roles, page 306

Defining Areas of Responsibility

Access the Area of Responsibility page.



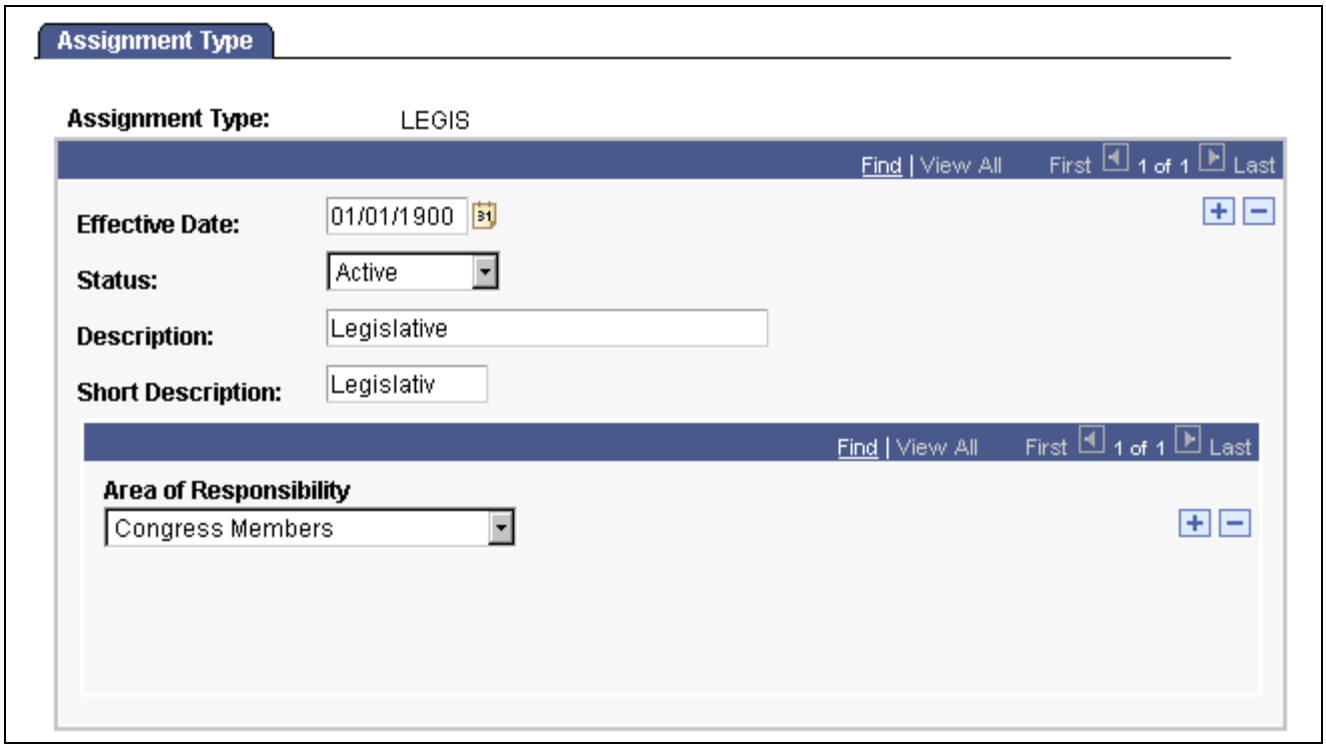
Area of Responsibility page

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

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

Defining Assignment Types

Access the Assignment Type page.



Assignment Type page

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

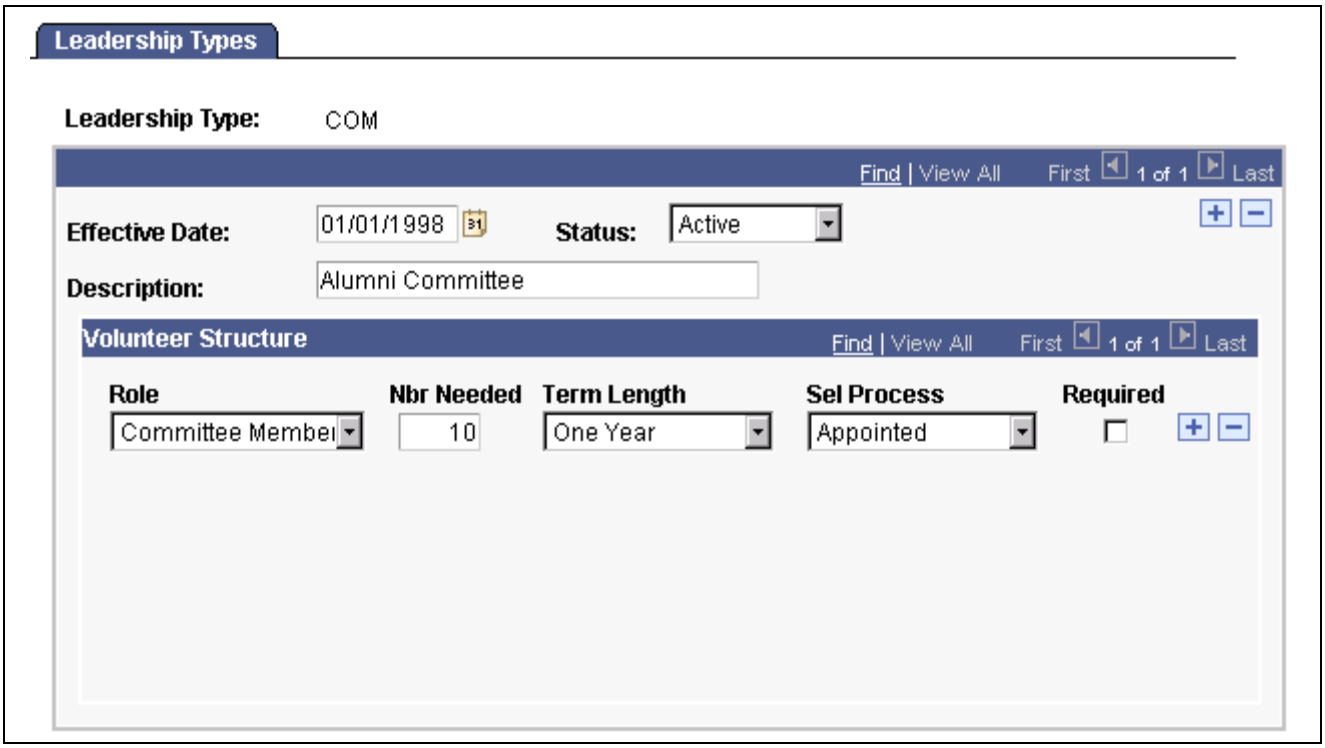
Area of Responsibility Select the valid area of responsibility for this assignment type. Assignment types are associated with one or more areas of responsibility. For example, when you define an assignment type of *Student Recruitment*, you can assign an area of responsibility called *High Schools*.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

See Also

Chapter 6, "Setting Up Initiatives," Defining Areas of Responsibility, page 69

Defining Leadership Types

Access the Leadership Types page.



Leadership Types page

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

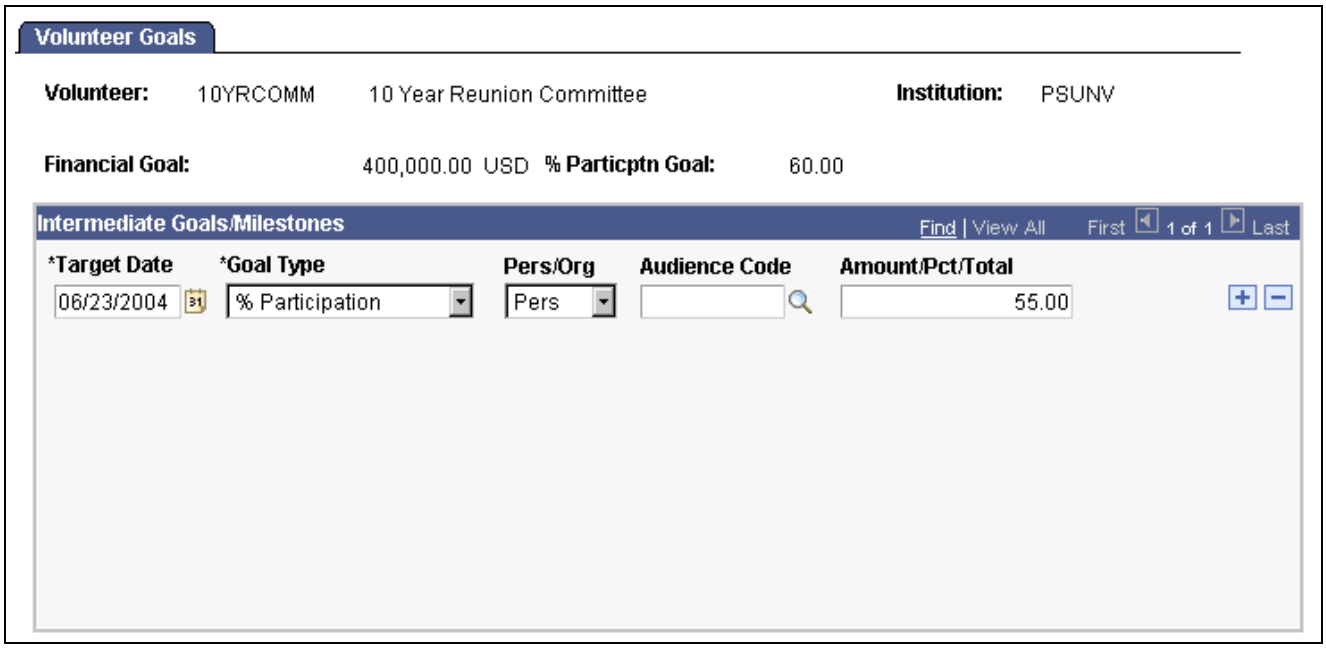
Examples of leadership types include *Board of Directors, Reunion Committee,* and *Fund Raising Team.*

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 can be filled.

Important! If you select the Required check box, the system prevents you from saving the volunteer structure without first assigning a volunteer to the position.

Defining Volunteer Initiative Goals

Access the Volunteer Goals page.



Volunteer Goals page

Financial Goal and **% Particptn Goal** (percent participation goal) — The system displays the financial goal and the participation percentage goal for the initiative. These goals are defined on the initial page on which the initiative is defined.

Target Date — Enter the date by which the goal may be reached.

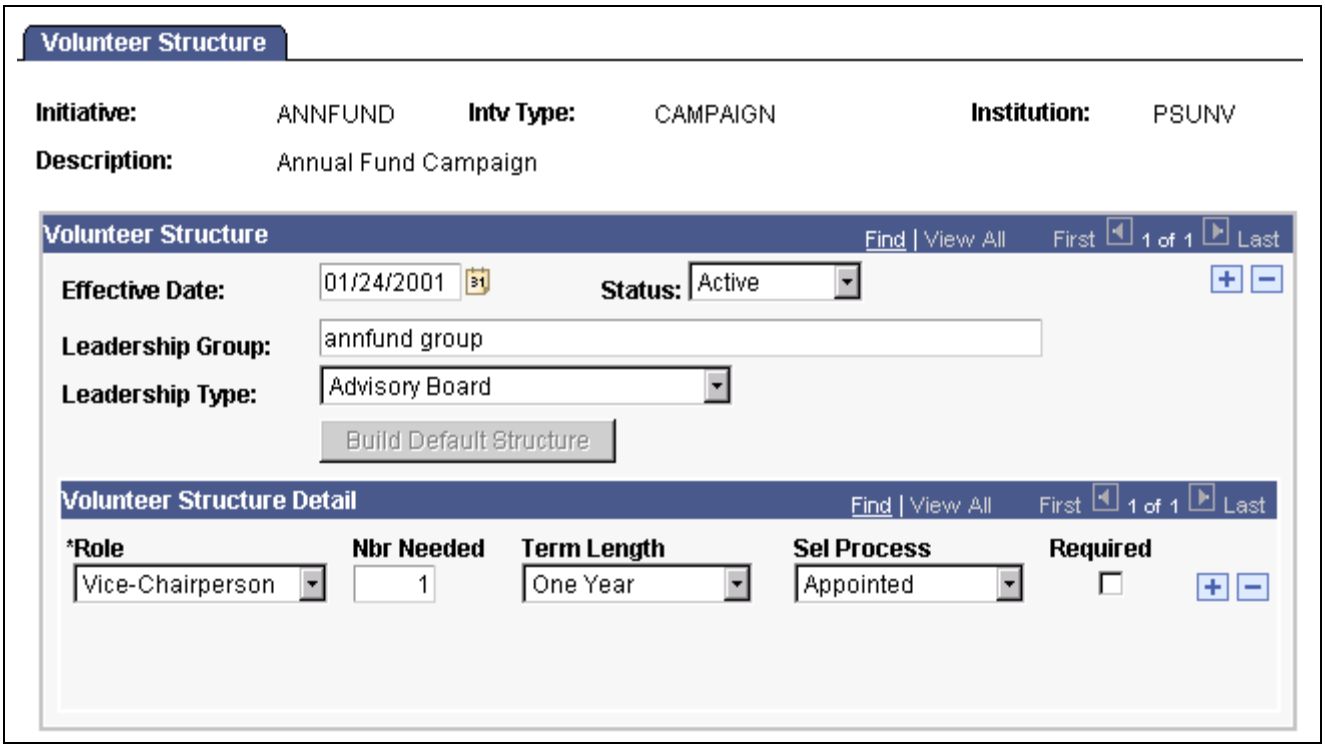
Goal Type — Select the measurement by which you track the progress toward the goal.

Audience Code — Specify the population to which the goal pertains. Available options include all of the populations that are defined by the institution on the Audience page with the type of *Segmentation* for this initiative.

Structuring the Leadership Group

After you have created an initiative or set up a membership organization at your institution, you might 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 specify how many volunteers are needed to fill each role. In addition, volunteer structures can contain subgroups or groups of volunteers that report to the initial leadership group.

Access the Volunteer Structure page.



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 defined on the Leadership Type page.

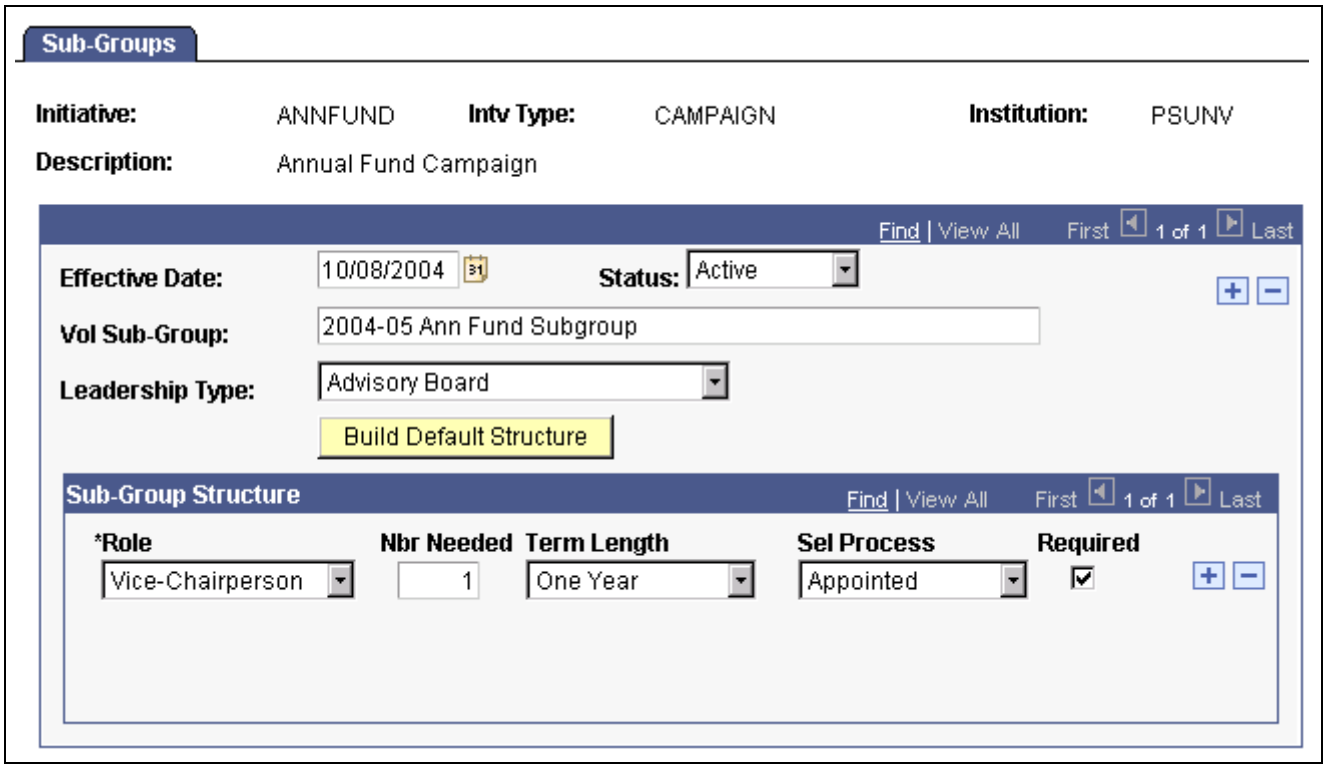
Build Default Structure Click to populate the Volunteer Structure Detail group box with the template structure specified by the leadership type that you selected. You can edit the structure if you use this choice.

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! If you select the Required check box, the system prevents you from saving the volunteer structure without assigning a volunteer to the position.

Defining Subgroups

Access the Sub-Groups page.



Sub-Groups page

Subgroups 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 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 make this selection.

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

Important! If you select the Required check box, the system prevents you from saving the volunteer structure without first assigning a volunteer to the position.

Setting Up Event Initiatives

To set up an event initiative, you must set up event types. Access the Event Type Table page in Campus Community to define the specific types of events at your institution, and to specify the event types that you want to use as default values in your system.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Setting Up Campus Event Planning"

CHAPTER 7

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.

Prerequisites

Before you begin the process of setting up the 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 *Enterprise PeopleTools documentation*

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

  What pledge reminder schedule 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 pledges to be fed to the GL Ledger 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 Enterprise 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 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

To set up gift types, use the Gift Types component (AV_GFT_TYPE_TBL).

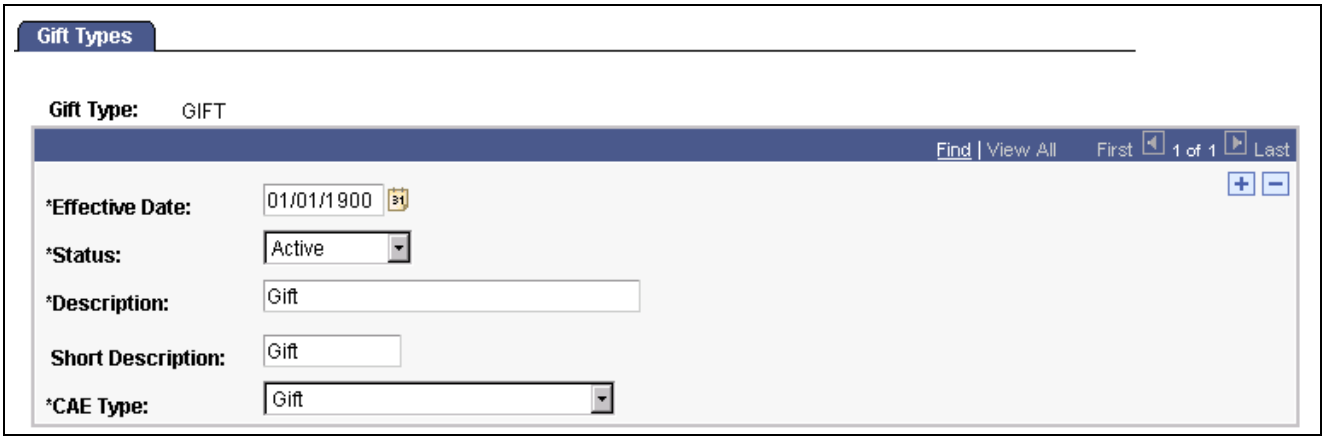
This section discusses how to set up gift types at your institution. Gift types are used on the Gift Entry and Gift Adjustment pages.

Page Used to Define Gift Types

Page Name	Object Name	Navigation	Usage
Gift Types	AV_GFT_TYPE_TBL	Set Up SACR, Product Related, Contributor Relations, Session Management, Gift Types	Set up the various types of gifts donors make to the institution.

Setting Up Gift Types

Access the Gift Types page.



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 C, “PeopleSoft Contributor Relations Reports,” AVPCAE, GFTINC, GFTINCII, GFTINCIV – CAE Gift Income Report, page 524

Defining Tender Types

To set up tender types, use the Tender Types component (AV_GFT_TNDR_TBL).

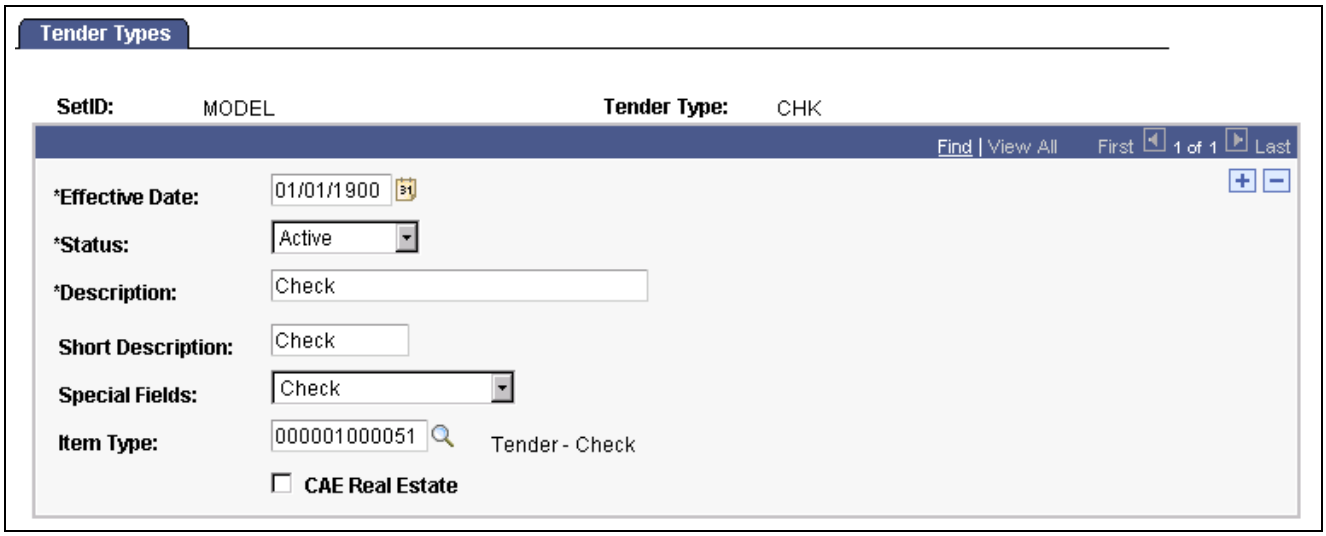
This section discusses how to set up tender types at your institution.

Page Used to Define Tender Types

Page Name	Object Name	Navigation	Usage
Tender Types	AV_GFT_TNDR_TBL	Set Up SACR, Product Related, Contributor Relations, Session Management, 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.



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.

Select *Allow Zero Amount* to enable gifts to be entered on the Gift Entry page with no monetary value to the institution.

Note. When you enter a gift with a tender type that has the *Allow Zero Amount* special field value selected, the tender detail button on the Gift Entry page does not appear for that gift. If any other gift is entered in the same session with a tender type that has a special field value of *Check* or *Credit Card*, the tender detail button appears accordingly.

Item Type Enter the item type to be used when processing a transaction with this tender to the 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 C, "PeopleSoft Contributor Relations Reports," AVPCAE, GFTINC, GFTINCII, GFTINCIV − CAE Gift Income Report, page 524

Defining Designation Types

To set up designation types, use the Designation Types component (AV_INST_TYP).

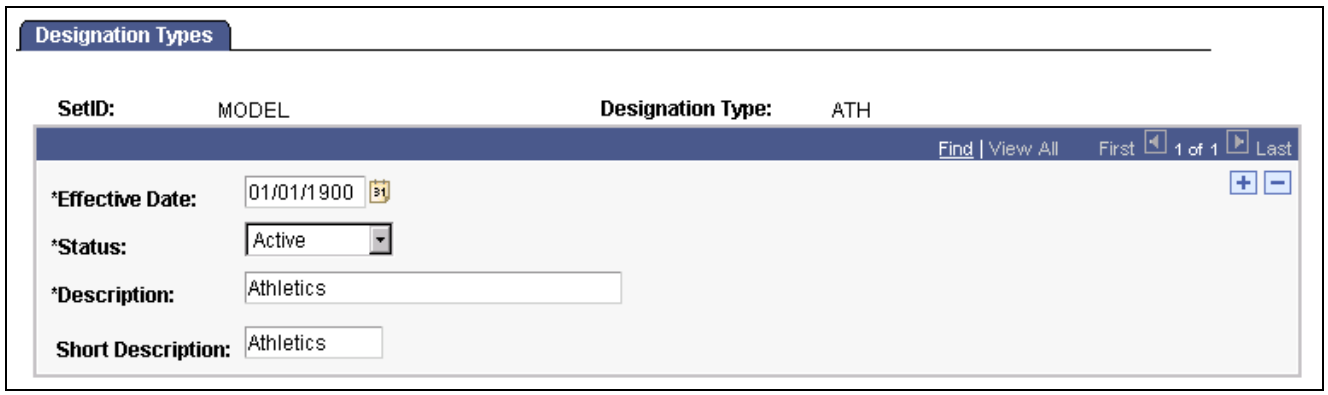
This section discusses how to set up valid designation types.

Page Used to Define Designation Types

Page Name	Object Name	Navigation	Usage
Designation Types	AV_INST_TYP_TBL	Set Up SACR, Product Related, Contributor Relations, Session Management, Designation Types	Set up the valid designation types for a setID.

Setting Up Designation Types

Access the Designation Types page.



Designation Types page

Designations are the projects, funds, or areas at the institution that receive appropriation from gift, pledge, or membership transactions. Designations are set up as allocation accounts that are linked to specific item types in the 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 custom 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

To set up matching gift types, use the Matching Gift Types component (AV_MTCH_GFT_TYP).

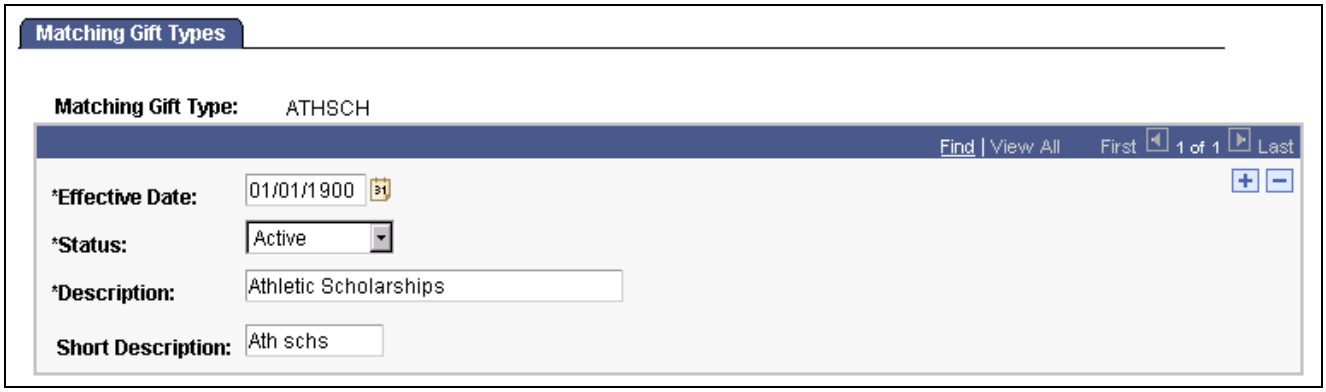
This section discusses how to set up valid matching gift types.

Page Used to Define Matching Gift Types for Designations

Page Name	Object Name	Navigation	Usage
Matching Gift Types	AV_MTCH_GFT_TBL	Set Up SACR, Product Related, Contributor Relations, Session Management, 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 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
Athletic scholarships	Deferred gifts
Athletic building projects	Gifts-in-kind

For Designations	For Gift Types
Non-athletic scholarships	Gifts of securities
Non-athletic building funds	Volunteer time

Defining Designation Funds

To set up designation funds, use the Designation Funds component (AV_DESIGNATIONS).

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

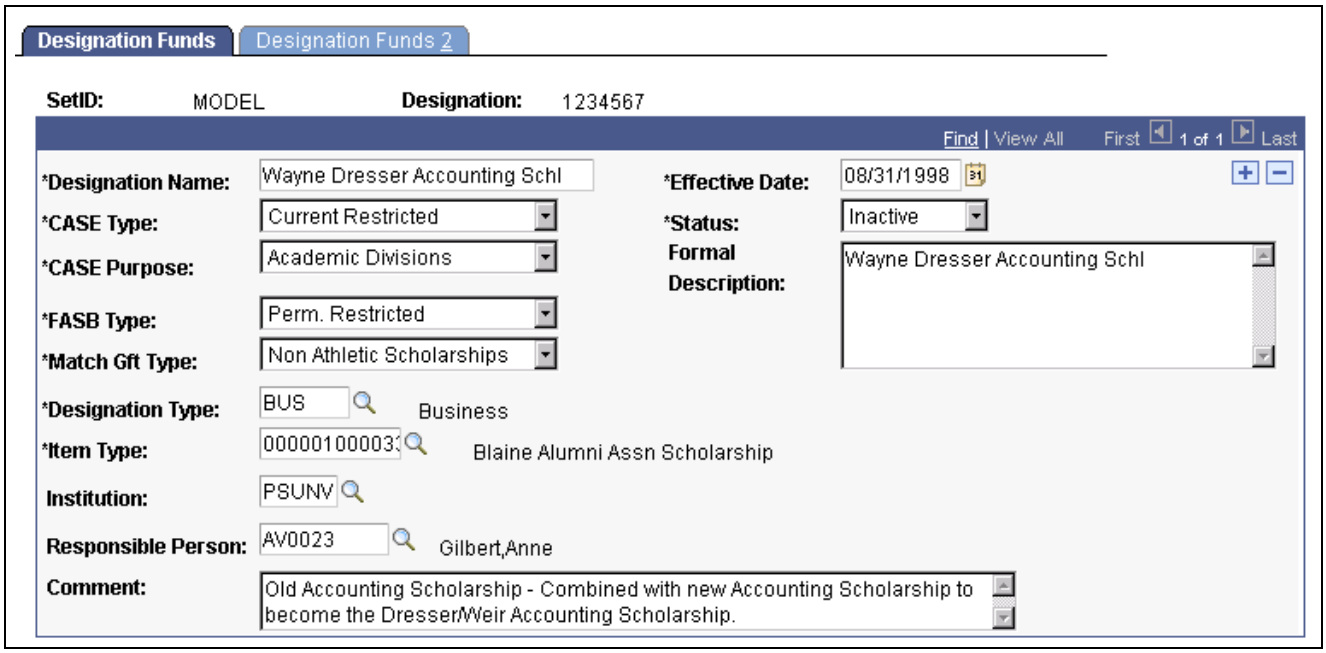
This section discusses how to set up designation funds.

Pages Used to Define Designation Funds

Page Name	Object Name	Navigation	Usage
Designation Funds	AV_DESIGNATION	Set Up SACR, Product Related, Contributor Relations, Session Management, 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	Set Up SACR, Product Related, Contributor Relations, Session Management, 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 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 the 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 the 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.

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

Match Gft Type (matching gift type)

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: *Athletic Activities Programs, Athletic Building Funds, Athletic Scholarships, Non Athletic Building Funds,* and *Non Athletic Scholarships.*

Note. Define a matching gift type of *None* for those gifts that do not match any of the other matching gift types, because the field is required and cannot be left blank. *None* indicates that matching gift companies put no restrictions on this designation.

Designation Type

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 *Law School, Athletic Accounts,* and so on.

Note. Include a designation type of *None* 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.

Item Type

Enter the specific reference to the chart of accounts within PeopleSoft Enterprise Student Financials.

Responsible Person

Enter the staff member responsible for managing this designation fund.

Formal Description

Enter a long designation description here, up to 254 characters. The value you enter here can be used when you generate acknowledgements.

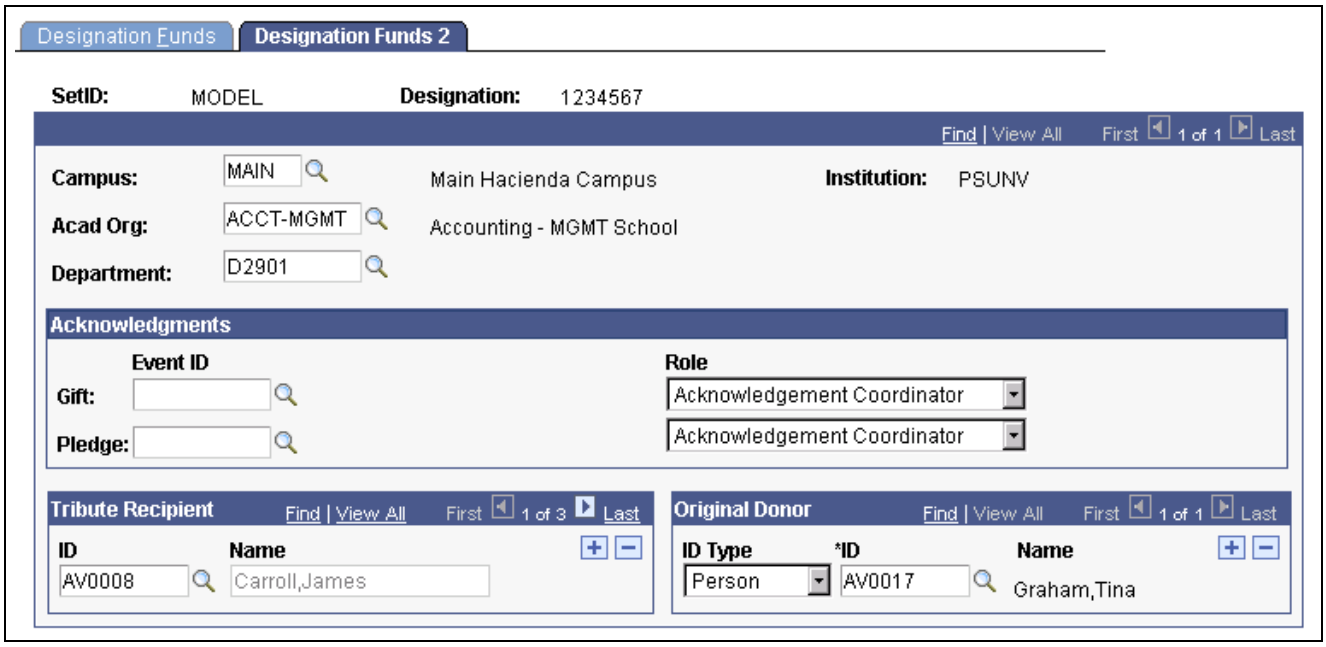
The Letter Generator process (CCLTRGEN) includes this field in the Comma Separated Values (.csv) data file it creates to generate both joint and individual letters. The field name is "DesigFormalxxx." To use this field in acknowledgements, modify the acknowledgement template.

See Also

Appendix C, "PeopleSoft Contributor Relations Reports," AVPCAE, GFTINC, GFTINCII, GFTINCIV − CAE Gift Income Report, page 524

Completing Designation Funds Setup

Access the Designation Funds 2 page.



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.

Defining Recognition Types

To set up recognition types, use the Recognition Types component (AV_RCG_TYPE_TBL).

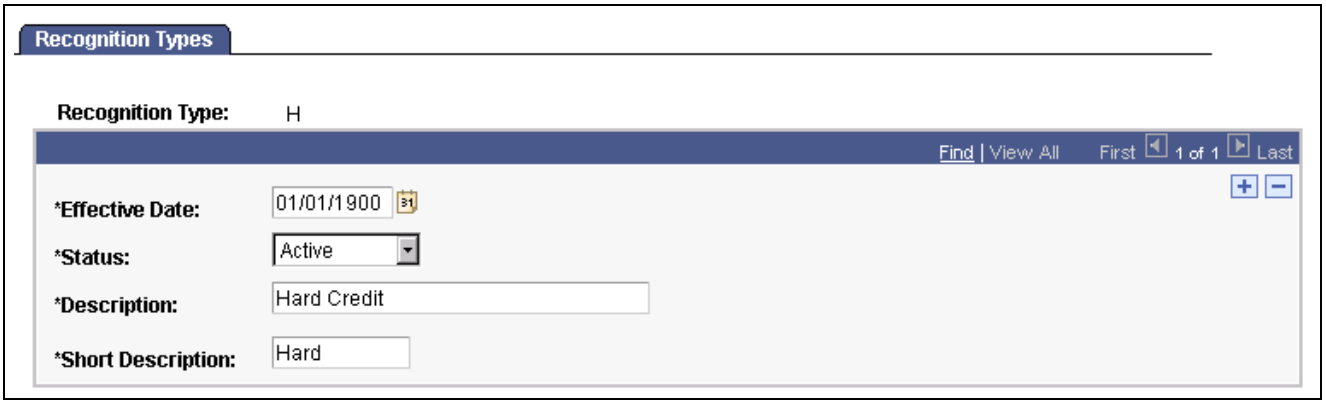
This section discusses how to set up credit recognition types.

Page Used to Define Recognition Types

Page Name	Object Name	Navigation	Usage
Recognition Types	AV_RCG_TYPE_TBL	Set Up SACR, Product Related, Contributor Relations, Session Management, 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 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.

Recognition Type Required Values

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

Code	Value
H	Hard Credit

Defining Adjustment Reasons

To set up adjustment reasons, use the Adjustment Reasons component (AV_ADJ_REASON_TBL).

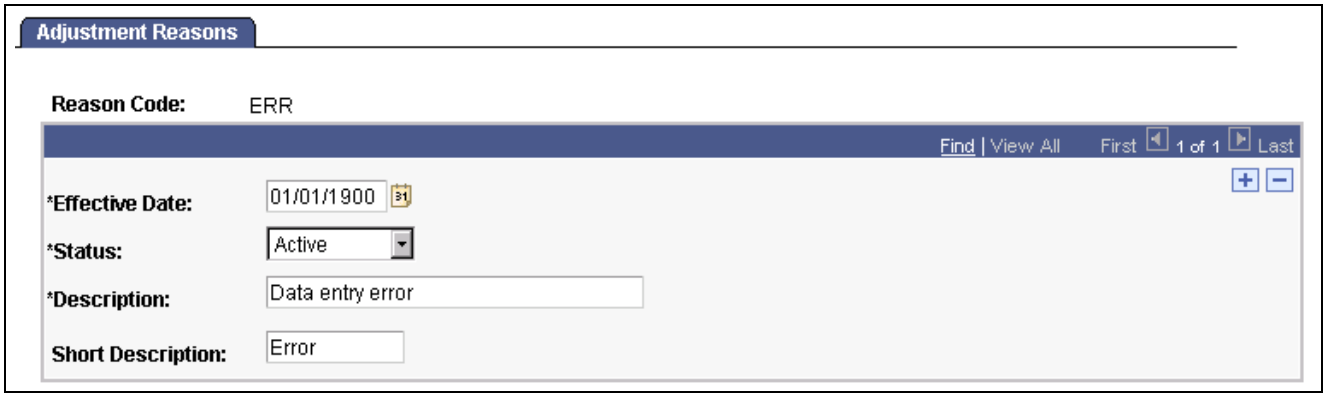
This section discusses how to set up valid reasons for transaction adjustment.

Page Used to Define Adjustment Reasons

Page Name	Object Name	Navigation	Usage
Adjustment Reasons	AV_ADJ_REASON_TBL	Set Up SACR, Product Related, Contributor Relations, Session Management, 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 page

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

Preparing for Session Posting

Before processing transactions to an 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 Enterprise Student Financials. This setID is used to retrieve detail calendars and item types from 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 Student Financials. You define chartfields and item types using the Student Financials system, then associate them with designations in Contributor Relations when you define designation funds using the Designation Funds page.

The following setup occurs in PeopleSoft Enterprise Financials:

- Setting up budget periods.
- Defining journal entry definitions.
- Defining a journal source.
- Defining journal generator template defaults.

Note. You must set up both a journal source and a journal generator template for Contributor Relations.

See Also

PeopleSoft Financials, Enterprise Service Automation and Supply Chain Management Application Fundamentals 8.8 PeopleBook

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 the 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 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 and CR to clearing account
1	Gift	Always Credit to designation account
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 the financial system, you do not need to create journal sets 2 and 3 for 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 18, "Processing Commitments," Processing and Posting Sessions, page 381

Completing Item Type Initial Setup

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 Enterprise Student Financials 8.9 PeopleBook, "Completing Student Financials General Setup," Setting Up Item Types and Item Type Groups

Defining a GL Interface

Use the GL Interface page to map an 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.

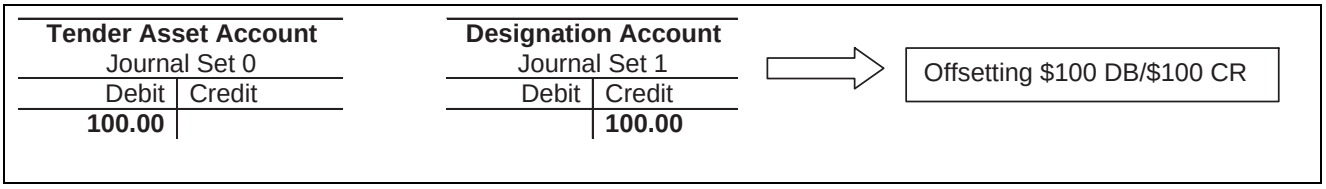
The Term and Session fields are unavailable for input when the item type classification is set to Contributor Relations.

Contributor Relations uses the Journal Sets on the GL Interface page in combination to create dual-line accounting entries. Tender and clearing account item types should always be created with a journal set of 0 and one debit row for the tender account or clearing account. Gift designation item types should always be entered with a journal set of 1 and credit row(s) for the designation account(s). Pledge designation item types should always be entered with a journal set of 2 and should have one debit row for the Accounts Receivable account and one credit row for the designation account. Pledge payment item types should be created with a journal set of 3 and one credit row to the Accounts Receivable account.

The following scenarios illustrate what occurs in GL Interface when the various journal sets are called.

Scenario 1

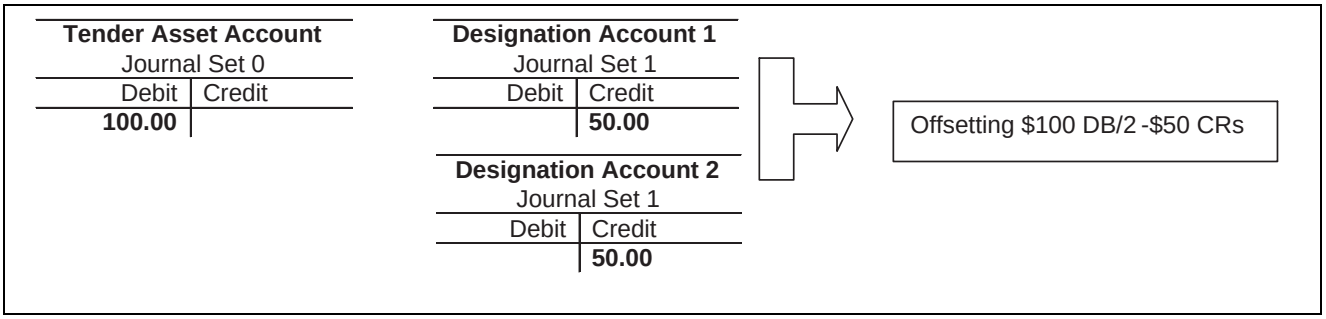
Donor makes gift of $100 to a single designation:



Scenario 1

Scenario 2

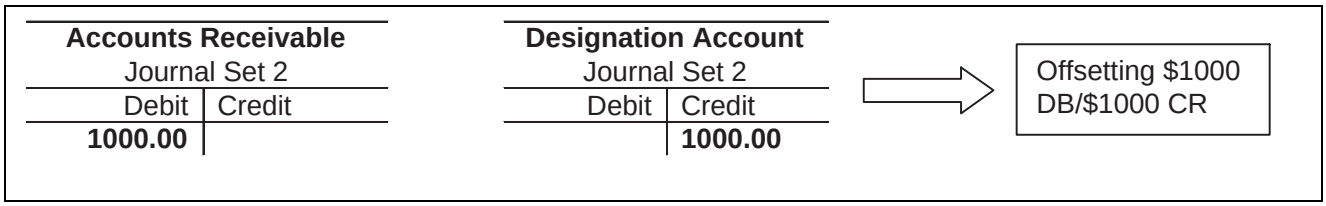
Donor makes gift of $100 to two designations:



Scenario 2

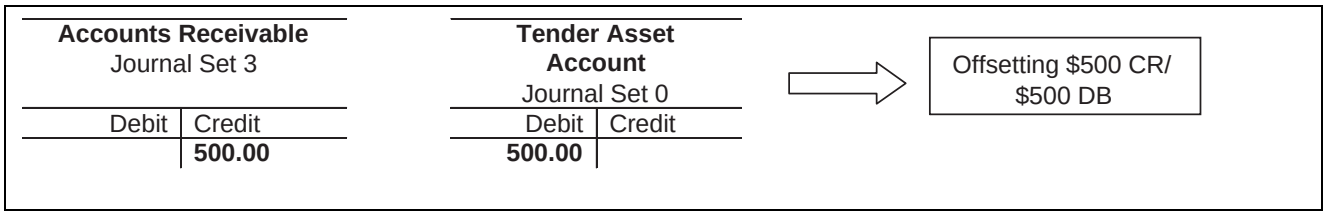
Scenario 3

Donor makes semi-annual pledge of $1000 to a single designation that is fed to the GL (multiple designations would be credited as in Scenario 2 above):



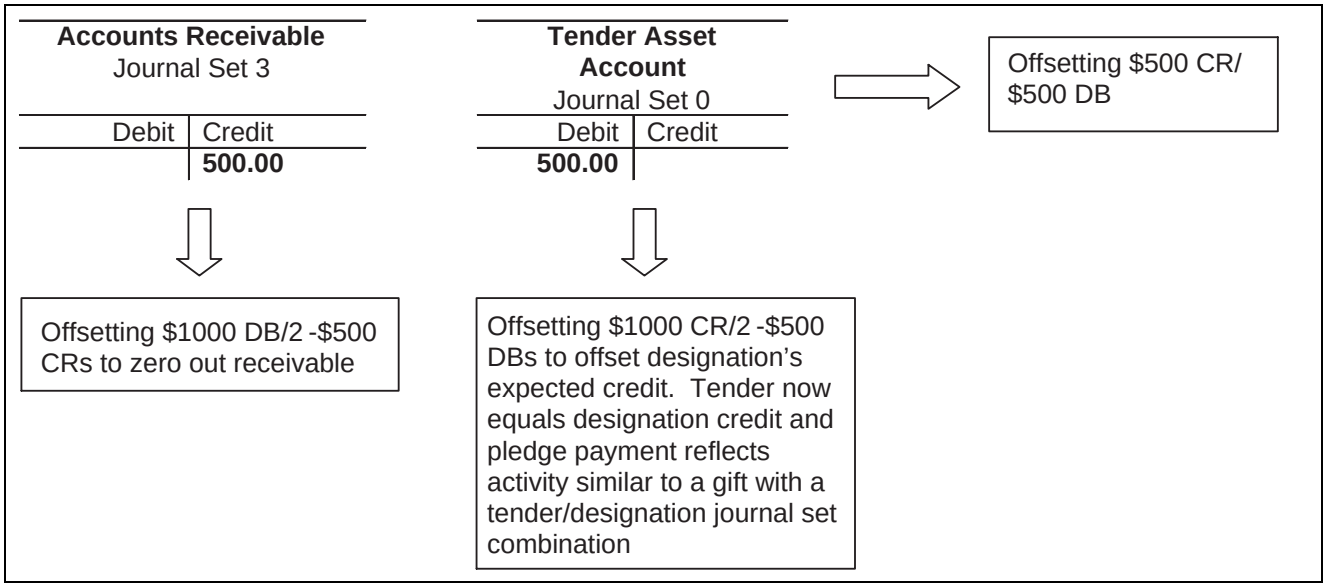
Scenario 3 (1 of 3)

Donor makes semi-annual pledge payment of $500 for the pledge above:



Scenario 3 (2 of 3)

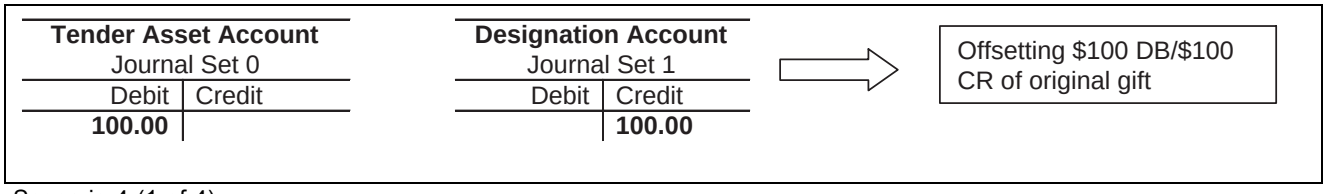
Donor makes final pledge payment of $500 for the pledge above:



Scenario 3 (3 of 3)

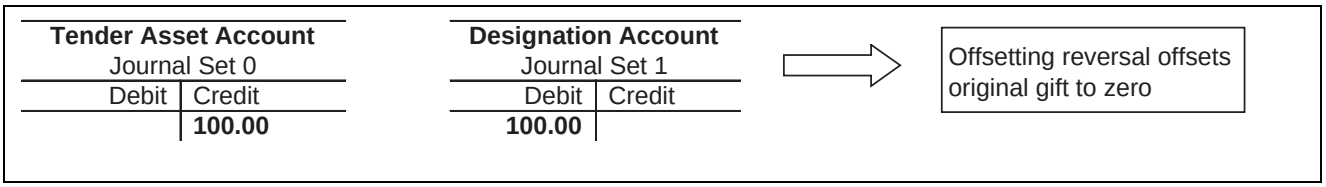
Scenario 4

The donor's gift in Scenario 1 is adjusted because the gift should have been $10 not $100:



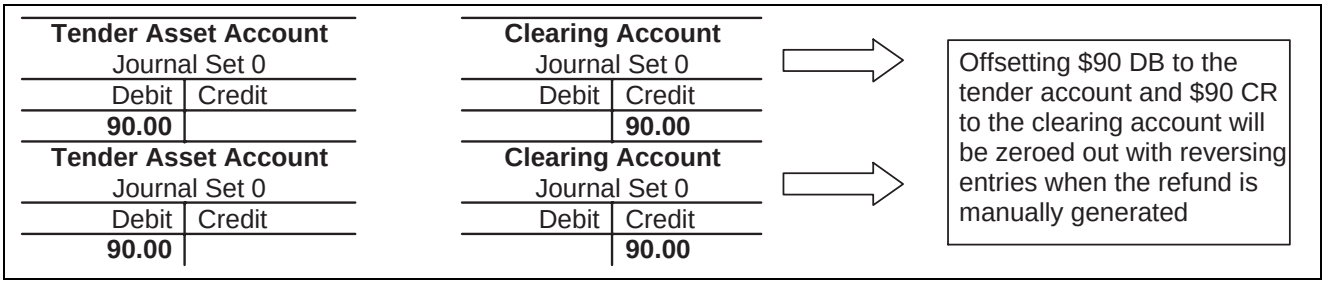
Scenario 4 (1 of 4)

Original gift is backed out with offsetting reversal entries that take the original gift to zero:



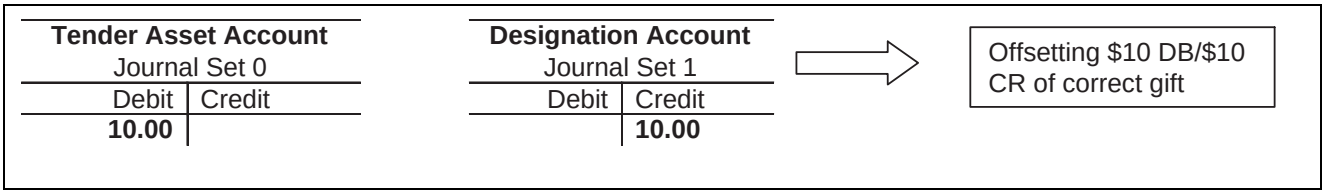
Scenario 4 (2 of 4)

The refund amount is entered to be offset when a refund is generated manually:



Scenario 4 (3 of 4)

The new corrected gift is created:



Scenario 4 (4 of 4)

See Also

PeopleSoft Enterprise Student Financials 8.9 PeopleBook, "Using GL Interface Processing," Creating Accounting Entries Using the GL Interface Process

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

To set up acknowledgement rules, use the Acknowledgement Setup component (AV_ACKNLDG_SETUP).

This section discusses how to set up the rules that determine which acknowledgement letter the system sends to a donor and which role manages an acknowledgement 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 configurable 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 Acknowledgement Priority group box on the Institution Installation 2 page.

Common Elements Used in This Section

No Receipt

This check box applies only to acknowledgement rules for *gifts*. The acknowledgement process never generates receipts for *pledges*. Select this check box for gift acknowledgements in either of the following situations:

- When you want the donor to receive another acknowledgement letter, in lieu of a receipt. In this instance, you would select the No Receipt check box and select an event ID for a communication other than a receipt. The system will suppress the default receipt for gifts in this example.
- When you want the donor to receive an acknowledgement receipt only (no overall acknowledgement letter). In this instance, you would select the check box and select the event ID for your default receipt.

Note. The system clears the No Receipt check box by default, acknowledging all gifts with a receipt (unless you specify otherwise).

Event ID, Role

Identify the event associated with the letter to send in the situation. Select the role for the type of person at your institution responsible for the action. Roles are descriptions of undertakings people take on at the institution.

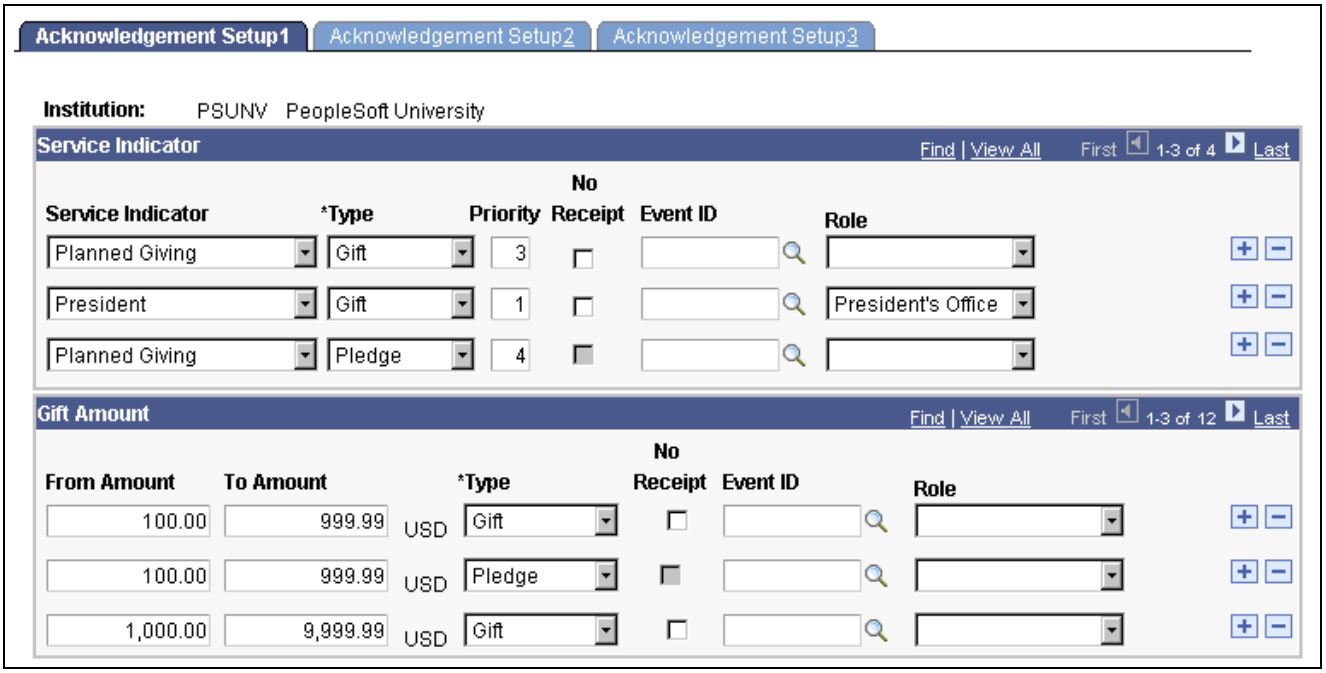
You can either enter an event ID or select a role. Choosing a value for one field clears the other field.

Pages Used to Define Acknowledgement Rules

Page Name	Object Name	Navigation	Usage
Acknowledgement Setup1	AV_ACKNLDG_SETUP	Set Up SACR, Product Related, Contributor Relations, Session Management, Acknowledgement Setup, Acknowledgement Setup1	Set up acknowledgement rules based on service indicators and gift amounts.
Acknowledgement Setup2	AV_ACKNLDG_SETUP2	Set Up SACR, Product Related, Contributor Relations, Session Management, 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	Set Up SACR, Product Related, Contributor Relations, Session Management, 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 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.

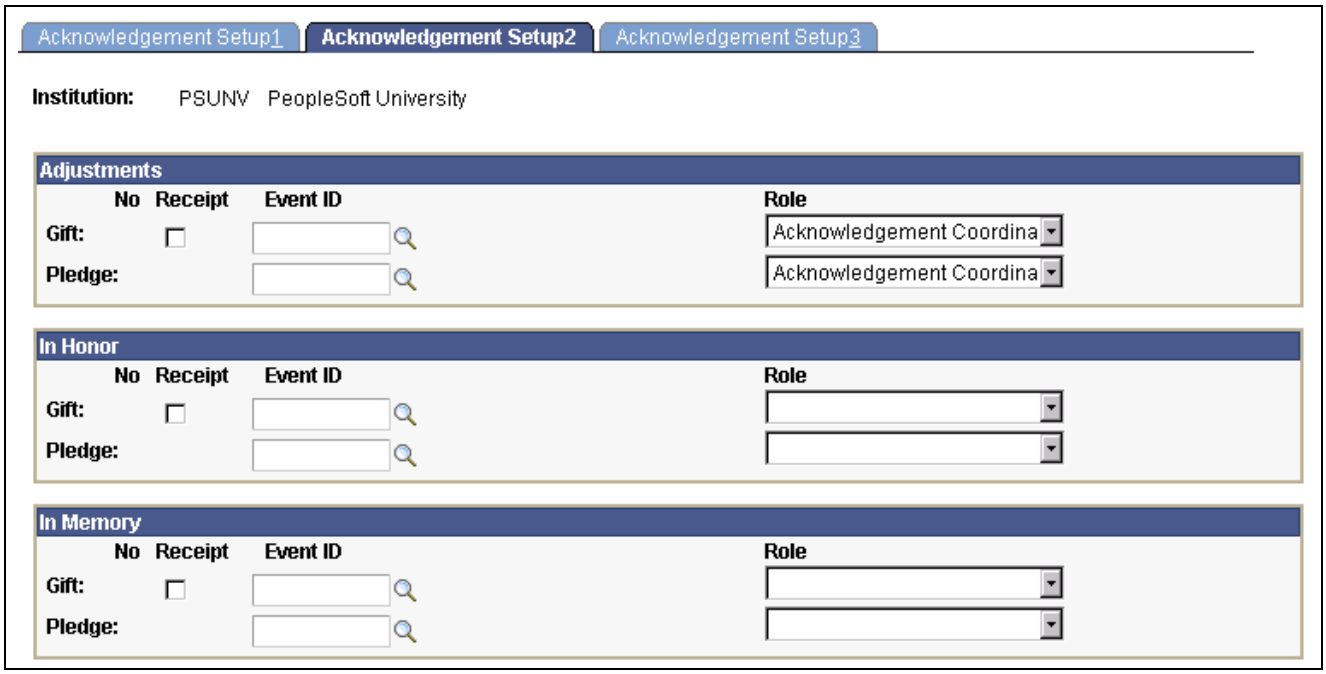
Priority — Enter a service indicator priority. The value you enter determines the priority used to select which acknowledgement a donor receives. For example, say you indicate *President* as priority *1* and *Planned Giving* as priority *2*. If a donor is both in the president's club and a planned giving 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 **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.

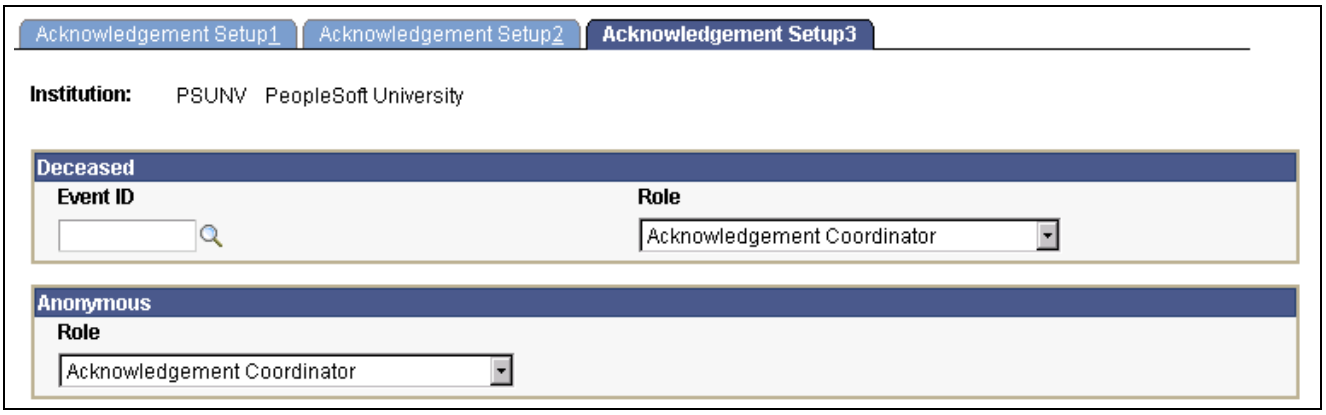


Acknowledgement Setup2 page

If you select the Adjusted Pledge or Adjusted Gift check box on the Institution Installation 2 page, and you do not specify any values in the Adjustments group box, the system displays an error message when you attempt to save the page. If you receive this error, you must enter an Event ID or Role in the Adjustments group box to save successfully.

Completing Acknowledgement Setup

Access the Acknowledgement Setup3 page.



Acknowledgement Setup3 page

All anonymous acknowledgements are configurable 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:

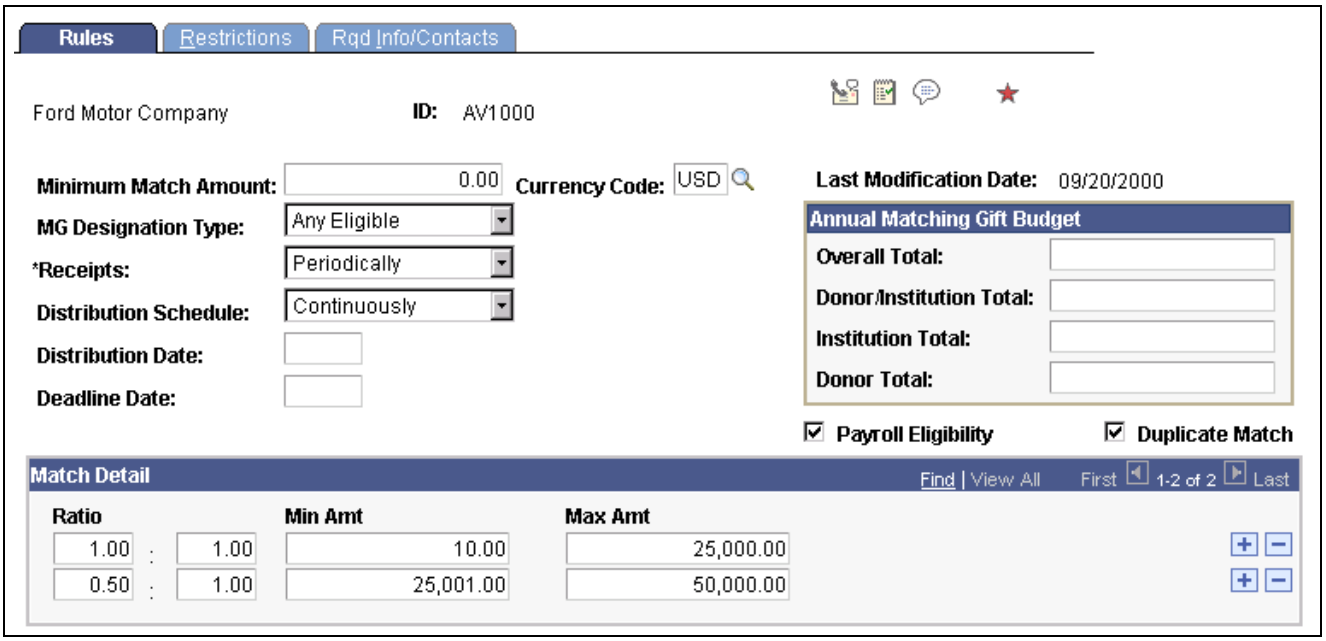
- Set up matching gift rules.
- Set up matching gift restrictions.
- Set up required information for matching gifts.

Pages Used to Define an Organization's Matching Gift Rules

Page Name	Object Name	Navigation	Usage
Rules	AV_MTCH_ORG_RULES	• Contributor Relations, Session Management, Matching Gifts, Add/Update Matching Rules • Contributor Relations, Session Management, Matching Gifts, Matching Rules - Workset	Begin entering information about an organization's match amount, ratio, and budget rules.
Restrictions	AV_MTCH_ORG_RULES2	• Contributor Relations, Session Management, Matching Gifts, Add/Update Matching Rules, Restrictions • Contributor Relations, Session Management, Matching Gifts, Matching Rules - Workset, 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	• Contributor Relations, Session Management, Matching Gifts, Add/Update Matching Rules, Rqd Info/Contacts • Contributor Relations, Session Management, Matching Gifts, Matching Rules - Workset, 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 page

Minimum Match 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.

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 the 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 the institution for each company gift. This field is not included in automated acknowledgement process.

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

Distribution Schedule Determine the frequency with which organizations make matching gift payments to your institution. Values include: *Annually, Continuously, Monthly, Quarterly,* and *Semiannually.*

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

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.

Match Detail

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

Ratio 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.

You can enter multiple match ratios as long as the amount ranges associated with each ratio do not overlap.

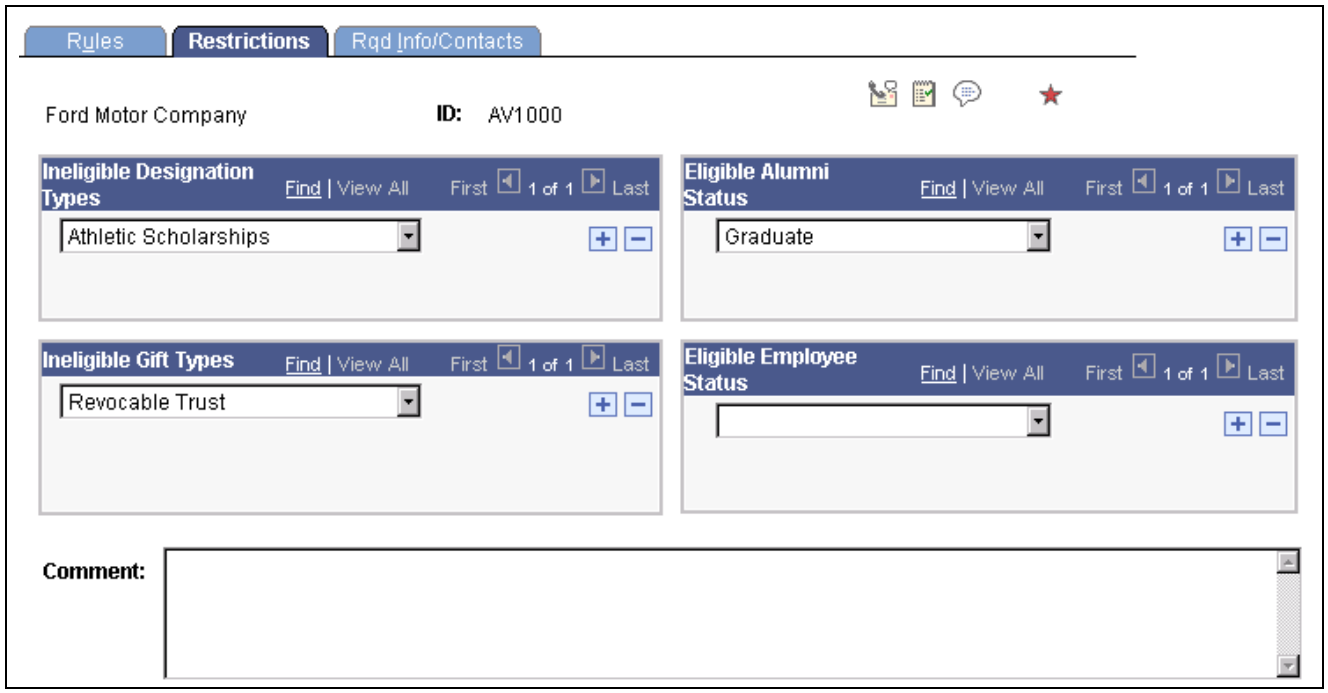
Min Amt and **Max Amt** (minimum amount and maximum amount) For each ratio, enter a minimum amount and maximum amount. These fields are used in the automatic calculation of the expected matching gift amount.

For example, if the matching gift organization matches 100 percent of gifts from 25-25,000 USD, the first minimum amount field on this page should be set to 25 USD and the first Ratio Minimum Amount field should be left blank or set to 0 USD. The maximum amount field should include the cap for the match ratio, or 25,000 USD. The system calculates that all qualified gifts are met at 100 percent up to 25,000 USD.

If the organization matches gifts larger than 25,000 USD 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.



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 the 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 the system as translate values. You can modify these translate values.

Comment 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.



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 the system as translate values. You can modify these translate values.

Matching Gift Contacts

This group box 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 this button 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:

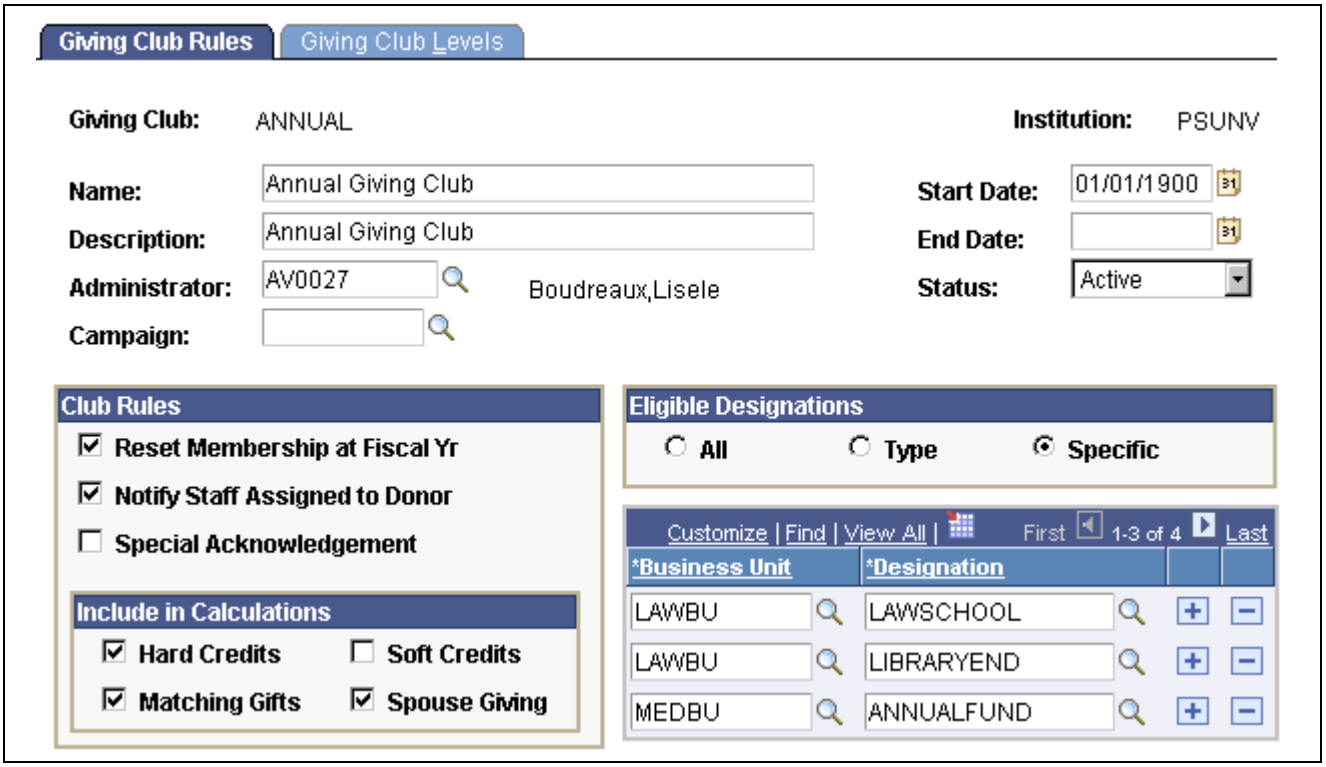
- Define giving clubs.
- Define giving club membership levels.

Pages Used to Define Giving Club Information

Page Name	Object Name	Navigation	Usage
Giving Club Rules	AV_GCLUB_TBL	Contributor Relations, Session Management, Giving Clubs, Giving Club Management, Giving Club Rules	Define the giving clubs at your institution.
Giving Club Levels	AV_GCLUB_LVL	Contributor Relations, Session Management, Giving Clubs, 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 page

Name Name the giving club (up to 30 characters).

Administrator Select a valid club administrator at your institution. Administrators are defined when you create Staff Assignments of Giving Club Administrator (GCA). This value is delivered in the AV_PRPS_TBL and should not be deleted.

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 custom acknowledgement letter announcing his or her membership status. This field is not used currently in the automated acknowledgement process.

Include in Calculations

Hard Credits — Select to include hard credit when calculating a donor's eligibility for this giving club.

Soft Credits — 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

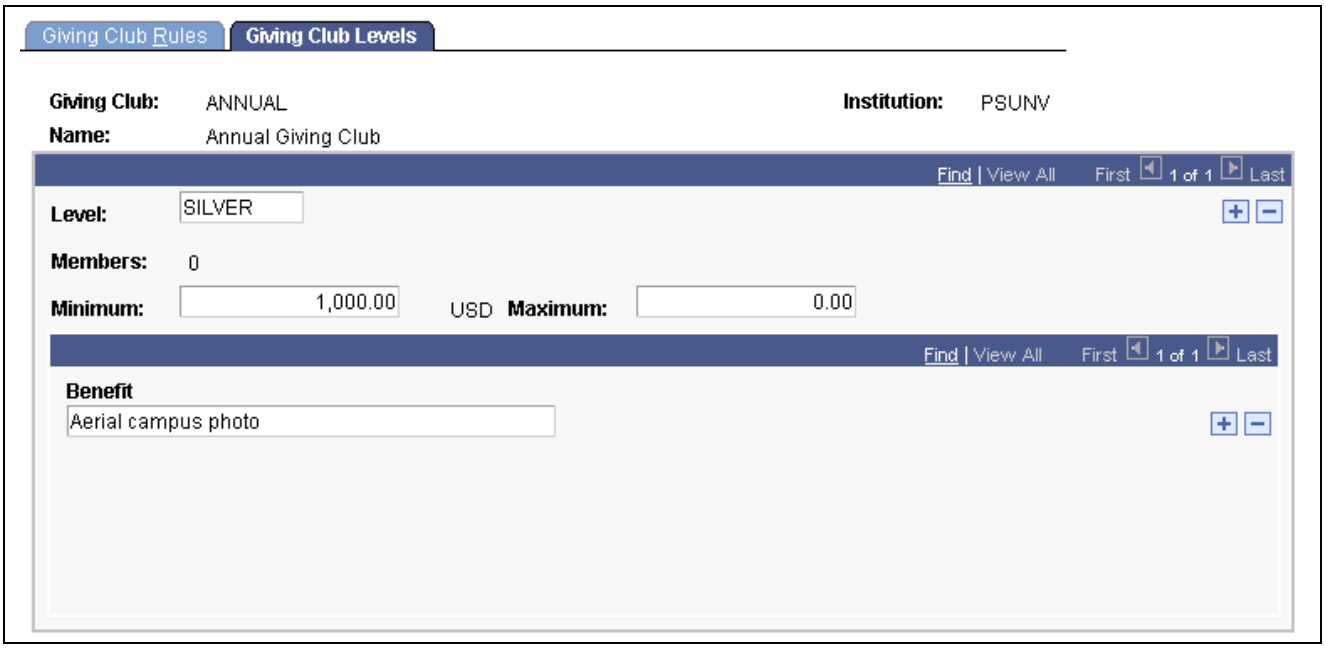
Business Unit — If you select *Type* or *Specific,* select the business unit associated with the designations to include in giving calculations. This field populates by default to the default business unit you selected when setting up user defaults.

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 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 *Bronze, Silver, Gold,* and *Platinum.*

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, event 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

To set up credit card processing, use the Credit Card Type component (AV_CR_CARD_TYPE), Merchant Table component (AV_MERCHANT_TBL), and Business Unit CR component (AV_BUS_UNIT).

Before you can enter gift or membership payments, or enable self-service online giving, you must set up the 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	Set Up SACR, Product Related, Contributor Relations, Session Management, Credit Card Type	Define which credit cards are acceptable for credit card processing for each setID.
CR Merchants (Contributor Relations merchants)	AV_MERCHANT_TBL	Set Up SACR, Product Related, Contributor Relations, Session Management, 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	Set Up SACR, Product Related, Contributor Relations, Install Contributor Relations, 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. After you have established these two relationships, you must configure the 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

"PeopleSoft Credit Card Interlink Installation and Technical Notes" on PeopleSoft Customer Connection

Defining Payment Methods

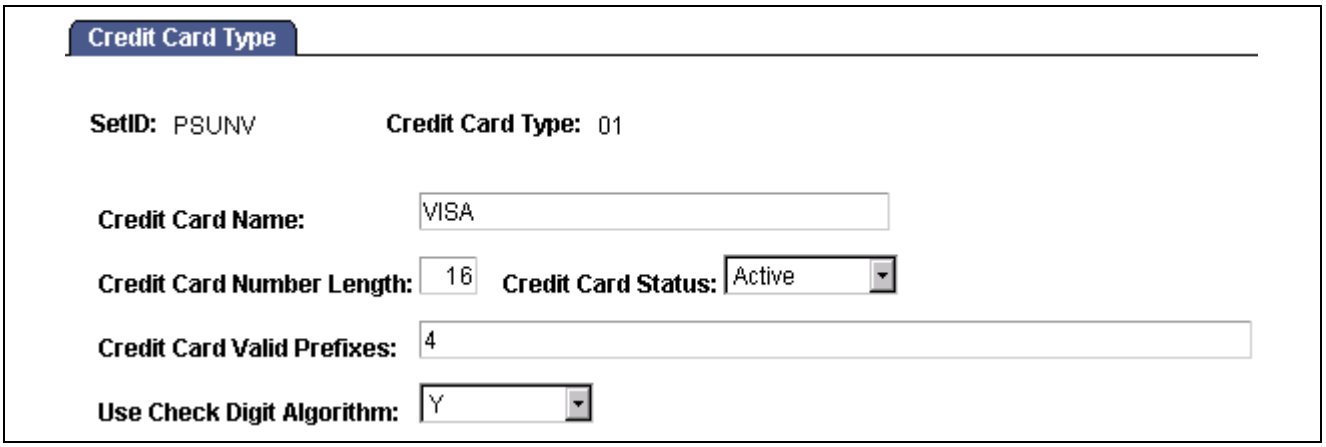
To specify credit card payments, you must use the Tender Types page to define a credit card tender type. The Tender Types page enables you to set up the monetary forms in which your organization receives gifts.

See Also

Chapter 7, "Setting Up Commitment Management," Defining Tender Types, page 79

Defining Credit Card Types

Access the Credit Card Type page.



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 self-service Involvement functionality.

Credit Card Number Length 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 in length to the value you specify. Separate valid card length values with a comma.

Common number length values are as follows:

- Visa: *13* or *16*
- MasterCard: *16*
- American Express: *15*
- Discover/Novus: *16*

Credit Card Status Select *Active* to make this credit card available for selection on credit card entry pages. Select *Inactive* to make this credit card unavailable for selection on credit card entry pages.

Credit Card Valid Prefixes Enter all valid prefix numbers for this credit card. Separate valid prefixes with a comma.

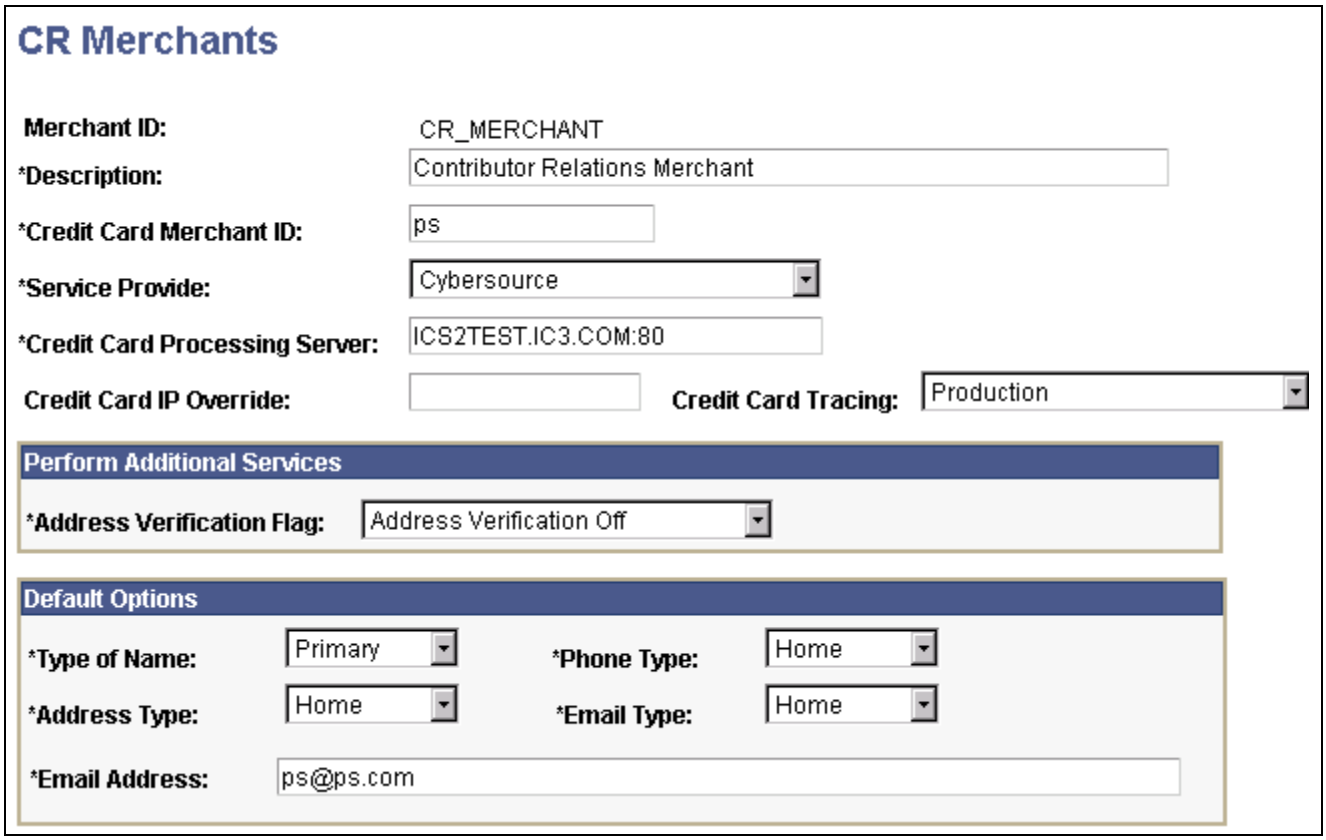
Common prefix values are as follows:

- Visa: *4*
- MasterCard: *51, 52, 53, 54,* or *55*
- American Express: *37* or *34*
- Discover/Novus: *6011*

Use Check Digit Algorithm Select *Y* (yes) to have the system check the validity of the credit card numbers during the credit card entry process. Select *N* (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 page

Credit Card Merchant ID Enter the identifier assigned to your organization by the third-party credit card service provider.

Service Provide Select your service provider. Your choices are *Cybersource* and *Unsupported.* 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 Select a control for the output files the system produces during each transaction. Your choices are:

- *Connect with Trace:* Connect with service provider and produce a trace file in C:\temp directory.
- *No Connect with Trace:* Do not connect with service provider, but produce a trace file in C:\temp directory.
- *Production:* No tracing of any kind.
- *Vendor Trace:* Connect with service provider and turn on service provider tracing.

Perform Additional Services

Address Verification Flag Select to verify that the address passed in the transaction matches the address on the credit card account. Your choices are: *Address Verification On,* and *Address Verification Off.*

Default Options

Type of Name Select the type of name (*Primary, Preferred, Legal,* 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 (*Business, Home,* 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 (*Primary, Preferred, Business,* 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 (*Home, Business,* 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 Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Adding a Person in PeopleSoft Enterprise Campus Solutions," Adding or Updating Biographical Details Data

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Securing Contributor Relations," Creating Contributor Relations Business Units

Setting Up Self-Service Online Giving and Pledges

To set up self-service online giving and pledges, use the Involvement component (AV_INST_WEB_INV) and the Giving Vehicles component (AV_GIVE_VEHICLE).

In addition to credit card interface setup requirements, there are eight pages that you must use to set up the system for online giving. These same pages enable you to set up self-service online pledge capability.

This section discusses how to:

- Define Involvement settings.
- Define web designations.
- Define web appeals.
- Define web campaigns.
- Define designations linked to a campaign.

- Define appeals linked to a campaign.
- Define giving vehicles.

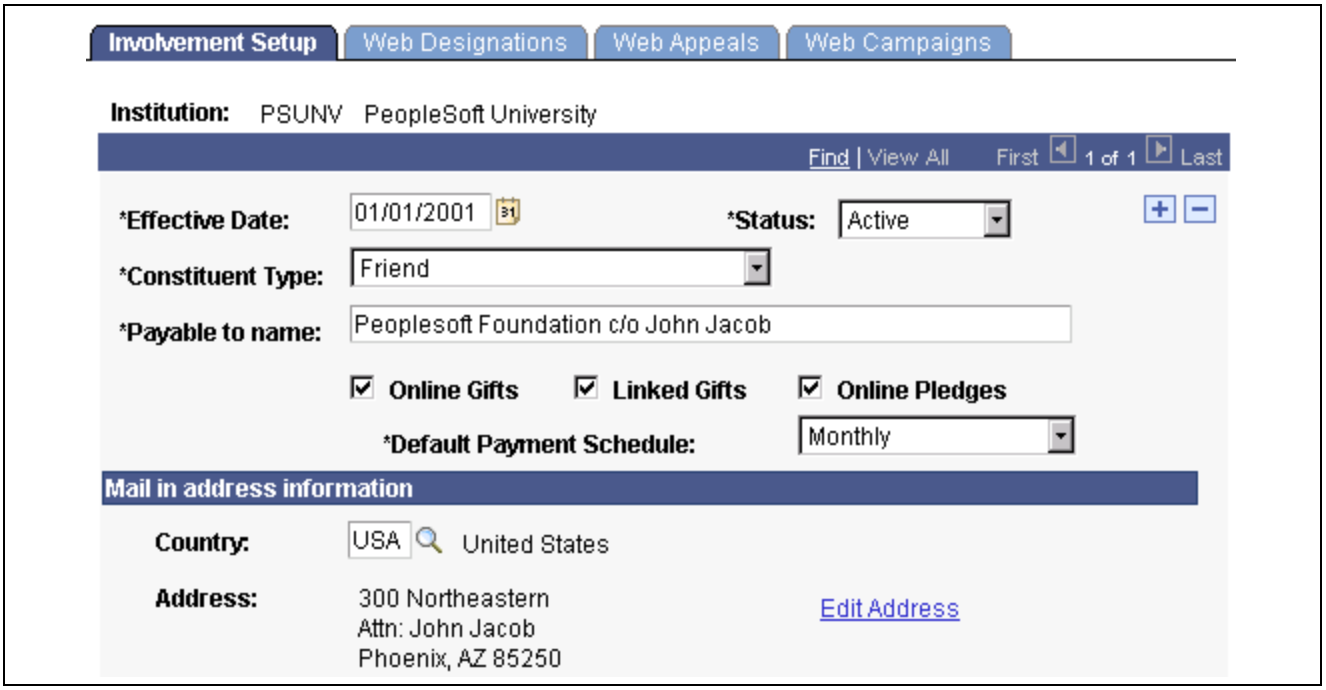
Although the pages above are not required by record definition or by code, self-service donors cannot make a gift or pledge unless information has been set up on those pages.

Pages Used to Set Up Self-Service Online Giving and Pledges

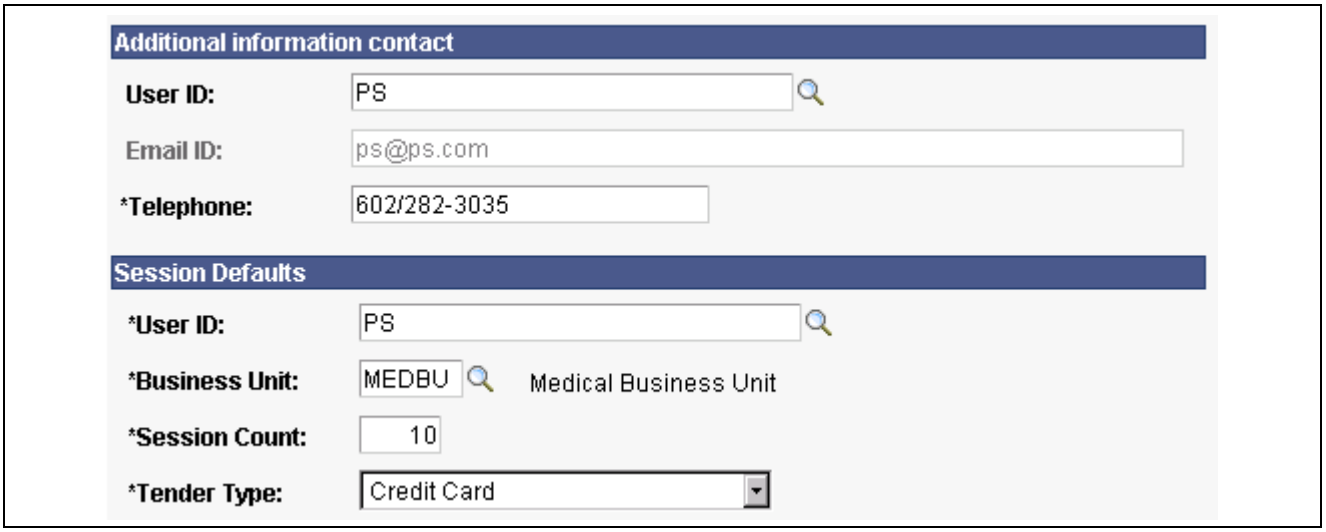
Page Name	Object Name	Navigation	Usage
Involvement Setup	AV_INST_WEB_INV	Set Up SACR, Common Definitions, Self Service, Involvement, Involvement, Involvement Setup	Set institution-specific settings for online gift and pledge sessions.
Web Designations	AV_INST_WEB_DES	Set Up SACR, Common Definitions, Self Service, Involvement, 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	Set Up SACR, Common Definitions, Self Service, Involvement, 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	Set Up SACR, Common Definitions, Self Service, Involvement, 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 Desig 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	Set Up SACR, Product Related, Contributor Relations, CR Product-Related, Gift and Pledge, Involvement, Giving Vehicles	Define and describe alternative methods of giving.

Defining Involvement Settings

Access the Involvement Setup page.



Involvement Setup page (1 of 2)



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 8, "Managing Constituent Data," Maintaining Constituent Types, page 127.

Payable to name Enter the institution or department name to which the donation or pledge will be sent.

Online Gifts, Linked Gifts, Online Pledges These three check boxes control the links that appear on the Donations − Ways to Give page:

Online Gifts: If selected, the system displays the *Make your gift securely online* link. This link takes donors directly to the Make a Donation − Welcome page to start the online giving process.

Linked Gifts: If selected, the system displays the *Invest in existing campaigns* 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.

Online Pledges: If selected, the system displays the *Make a pledge online* link. This link takes donors to the Make a Donation − Welcome page to start the online pledge process.

Default Payment Schedule Select the default payment schedule value to appear on the Make a Donation − Payment Information page for pledges. Delivered values are *Semi-Annual, Annual, Bi-Monthly, Monthly, Quarterly,* and *Weekly.*

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.

User ID Select the ID of a staff member that corresponds to the email address that you want to appear as a link 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 7, "Setting Up Commitment Management," Setting Up Credit Card Processing, page 105.

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*.

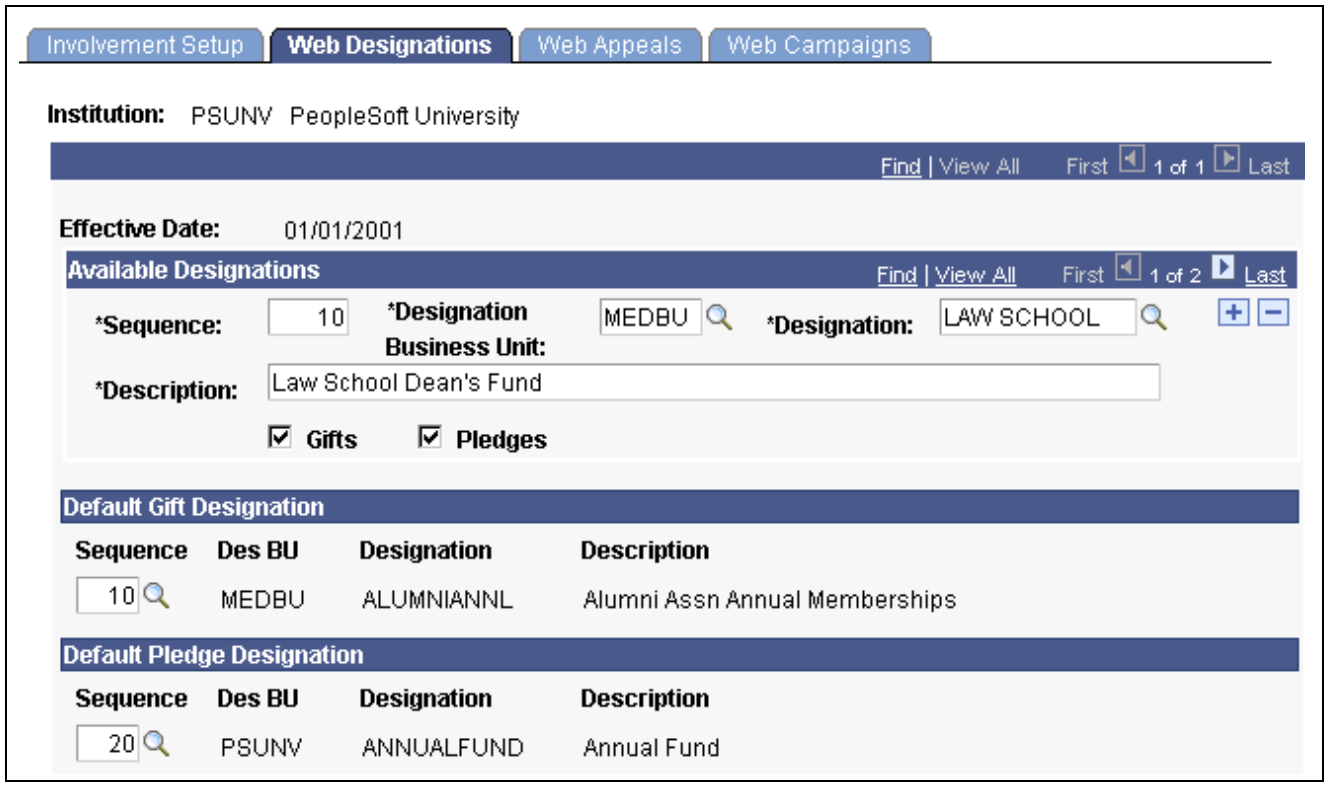
Tender Type Select the tender type assigned to the self-service gift for online giving. Only tender types with a Special Fields value of *Credit Card* appear in the list.

Note. This field does not apply to pledges.

See Chapter 7, "Setting Up Commitment Management," Defining Tender Types, page 79.

Defining Web Designations

Access the Web Designations page.



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.

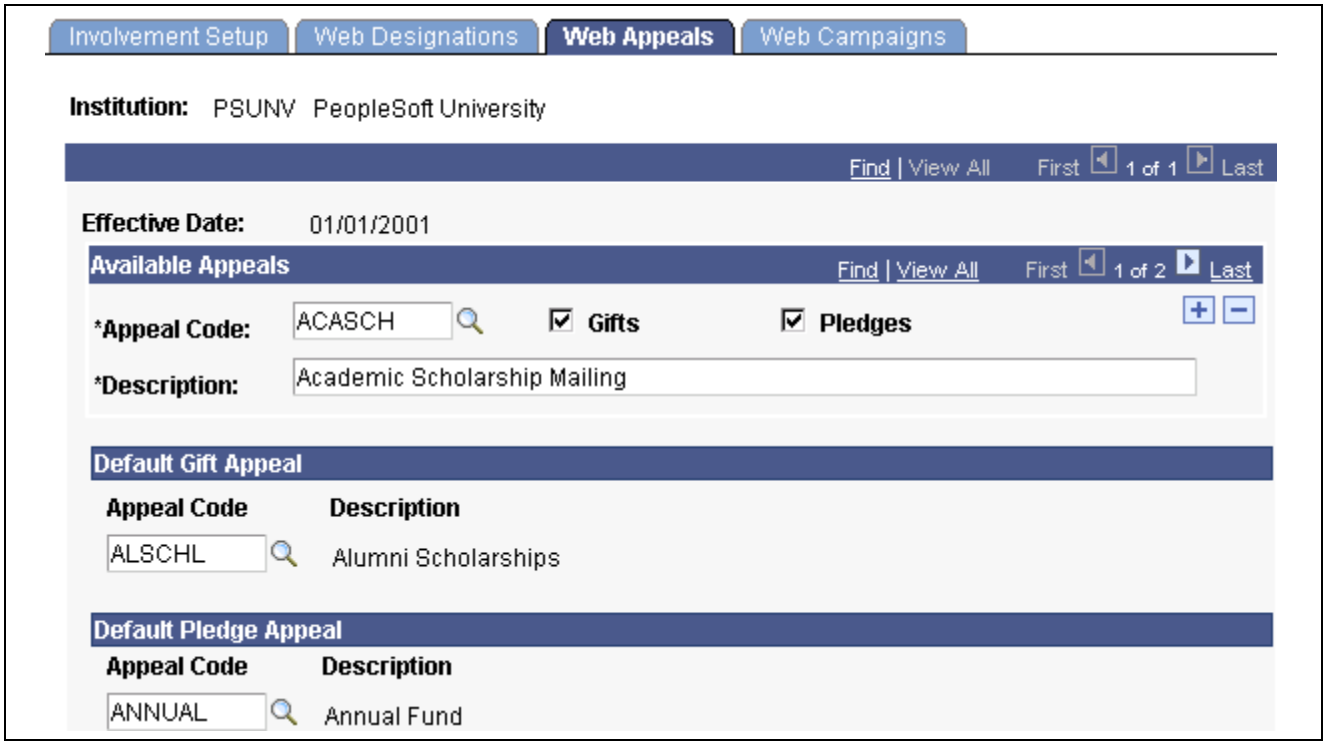
Default Pledge Designation

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.



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.

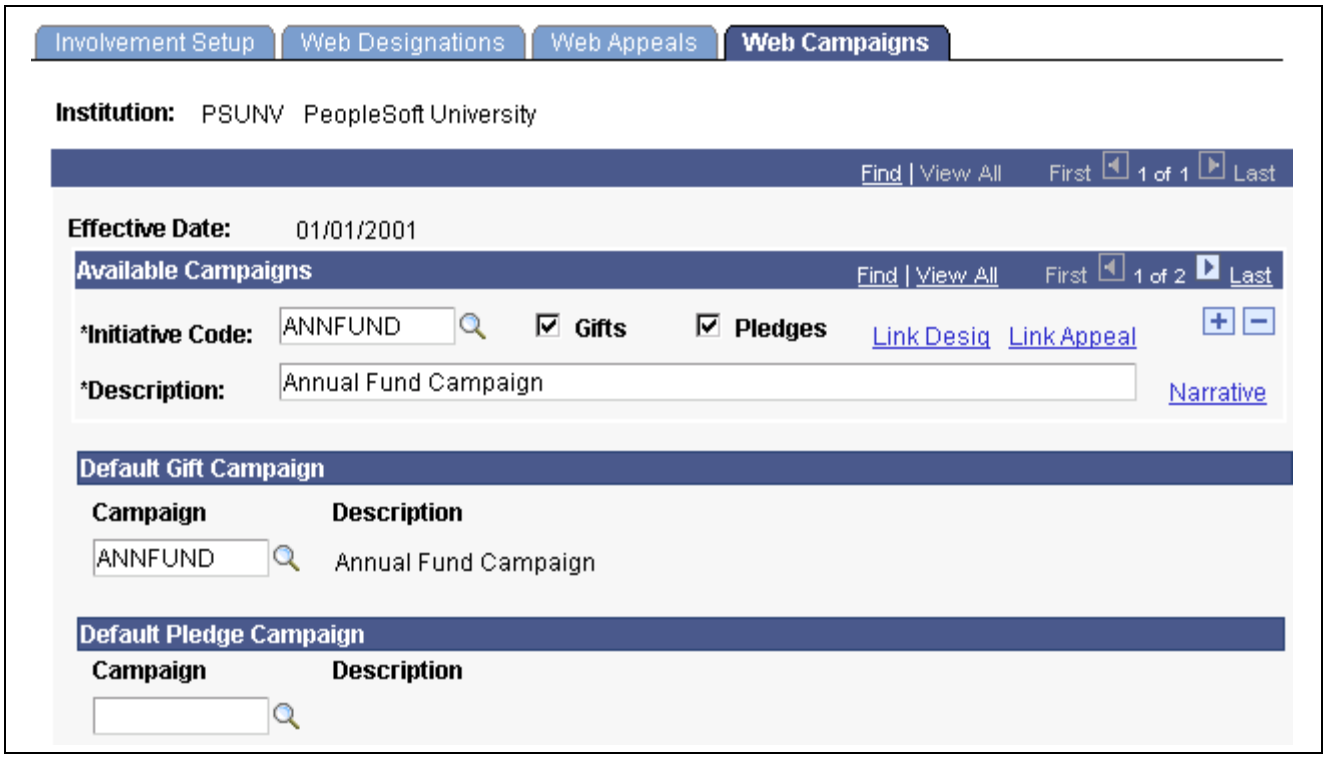
Default Pledge Appeal

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.



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 *Give to this campaign* 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 *Pledge to this campaign* link next to it.

Link Desig (link designations) — 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.

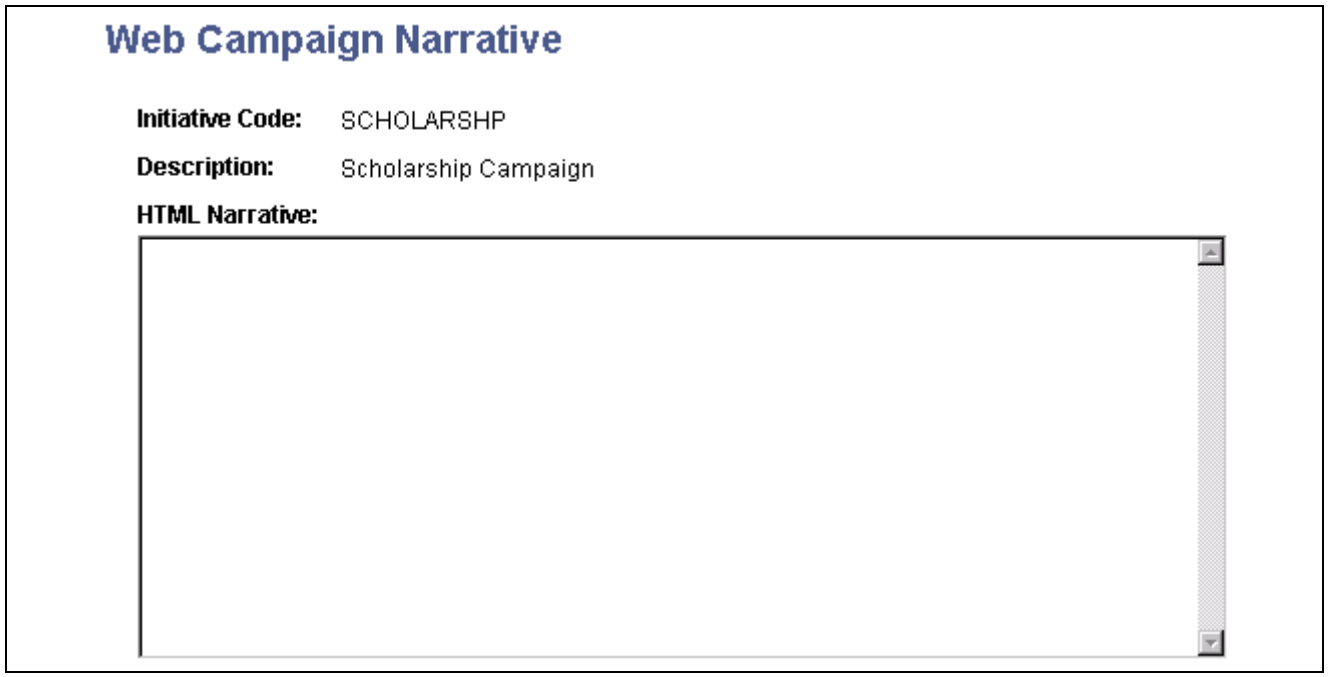
Default Pledge Campaign

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.

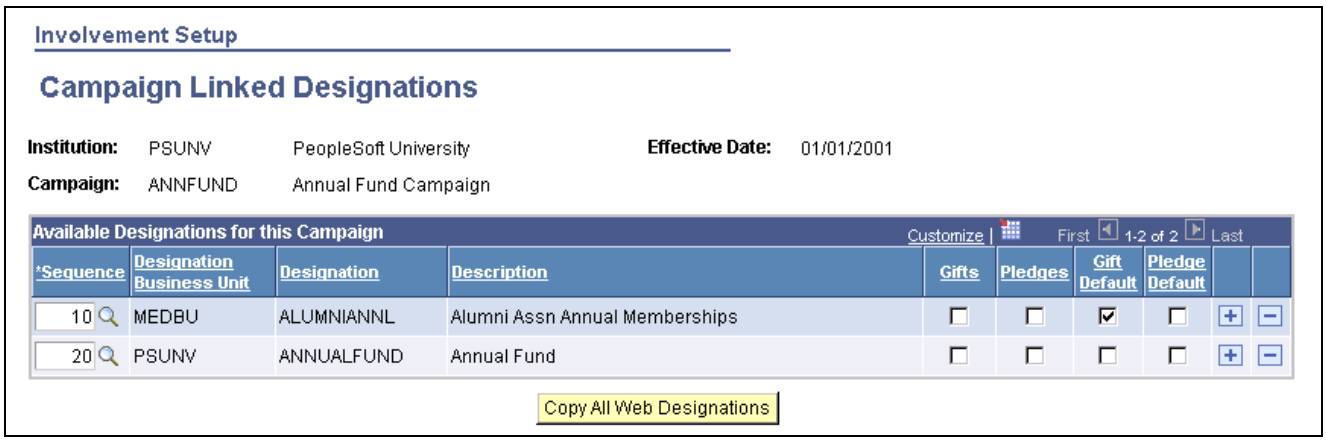


Web Campaign Narrative page

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 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.

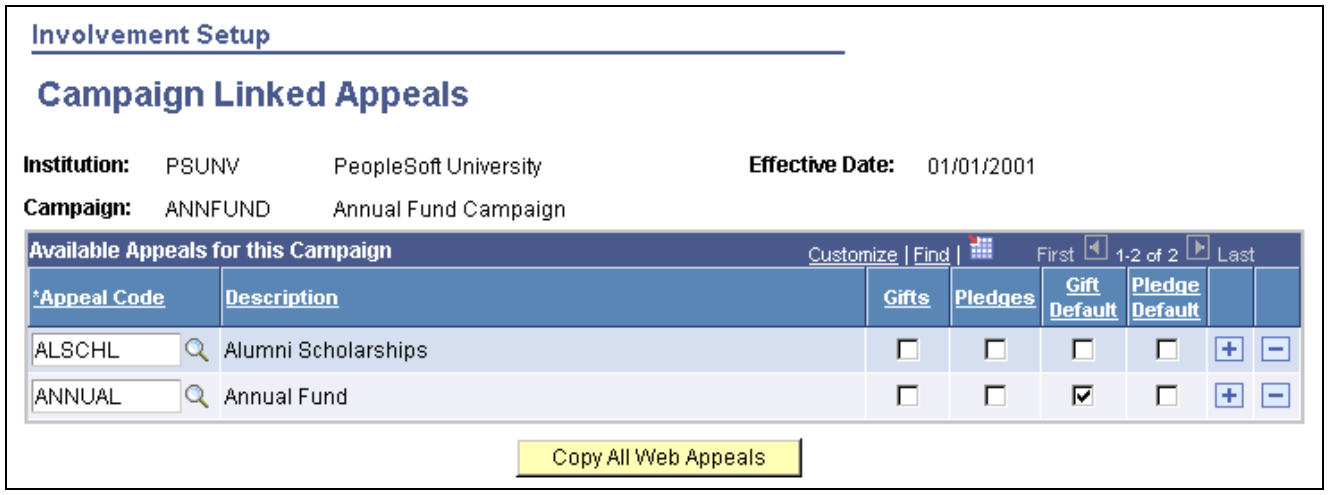
Pledges Select to link a designation to the campaign for self-service pledges. The Pledges column appears here only if the Pledges check box is selected on the Web Campaigns page. Also, if the Pledges check box is cleared on the Web Designations page for a particular designation, the check box appears 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 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.

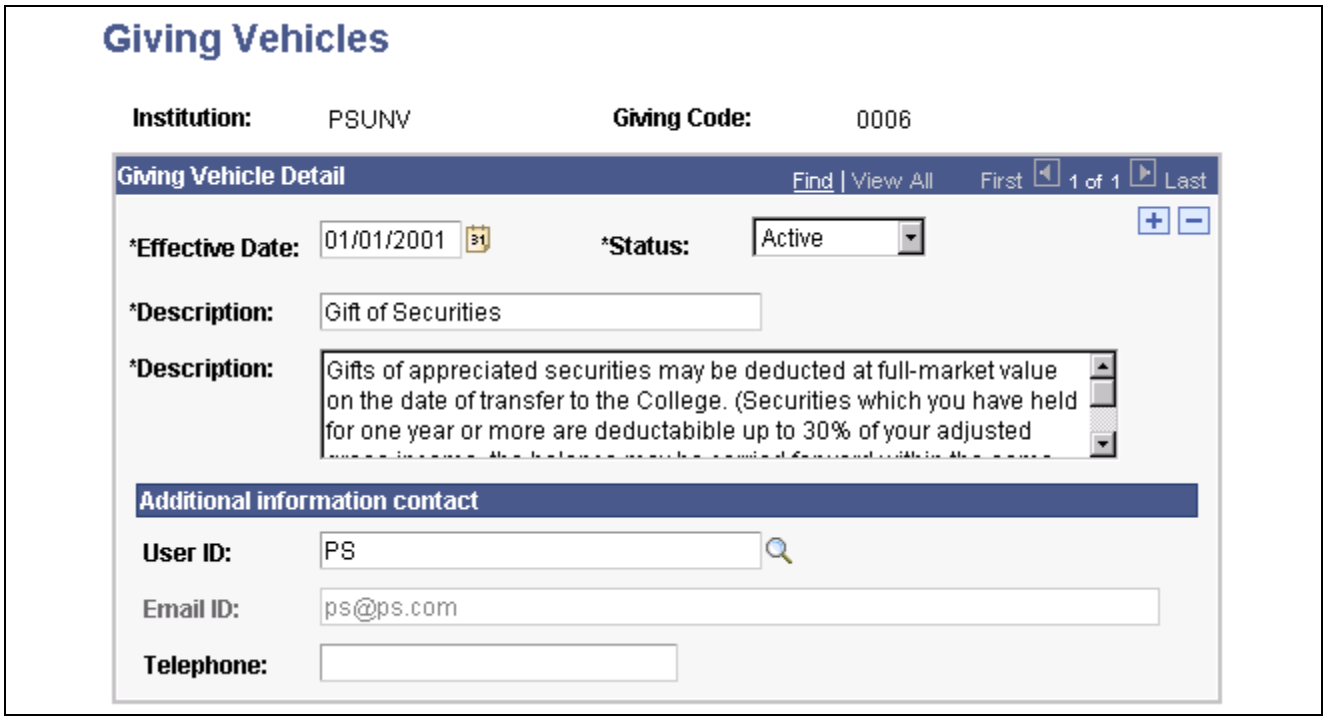
Pledges Select to link an appeal to the campaign for self-service pledges. The Pledges column appears here only if the Pledges check box is selected on the Web Campaigns page. Also, if the Pledges check box is cleared on the Web Appeals page for a particular appeal, the check box appears here but is 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 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.

Description Enter a short description of 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 8

Managing Constituent Data

This chapter discusses how to:

- Search for records.
- Add people to the 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 or add a donor.
- View a constituent's audience history.
- Maintain involvement information.
- Establishing relationships.

See Also

Chapter 4, "Setting Up Constituent Data," page 25

Searching for Records

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

- Use Search/Match functionality.
- Search for people.
- View search results.

Understanding Records

Contributor Relations provides two different mechanisms to search for constituent records:

- The Search/Match page is identical to the one found in 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 ensure that a person does not already have an existing record before you add the person 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 can search for all the constituents with a class year of 1990 that reside in Texas.

Pages Used to Search for Records

Page Name	Object Name	Navigation	Usage
Search/Match	SEARCH_TABLE	• Contributor Relations, Constituent Information, People, Search/Match • Contributor Relations, Prospect Management, Search/Match	Specify sets of criteria and arrange them in order for searching for duplicate or multiple records.
CR Search (Contributor Relations search)	AV_SEARCH_MATCH	• Contributor Relations, Constituent Information, People, Contributor Relations Search • Contributor Relations, Prospect Management, Contributor Relations 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.
CR Search Result	AV_SEARCH_MATCH_R	• Contributor Relations, Constituent Information, People, Contributor Relations Search, CR Search Result • Contributor Relations, Prospect Management, Contributor Relations Search, CR Search Result	View a list of constituents that match the search criteria that you selected on the CR Search page.

Using Search/Match Functionality

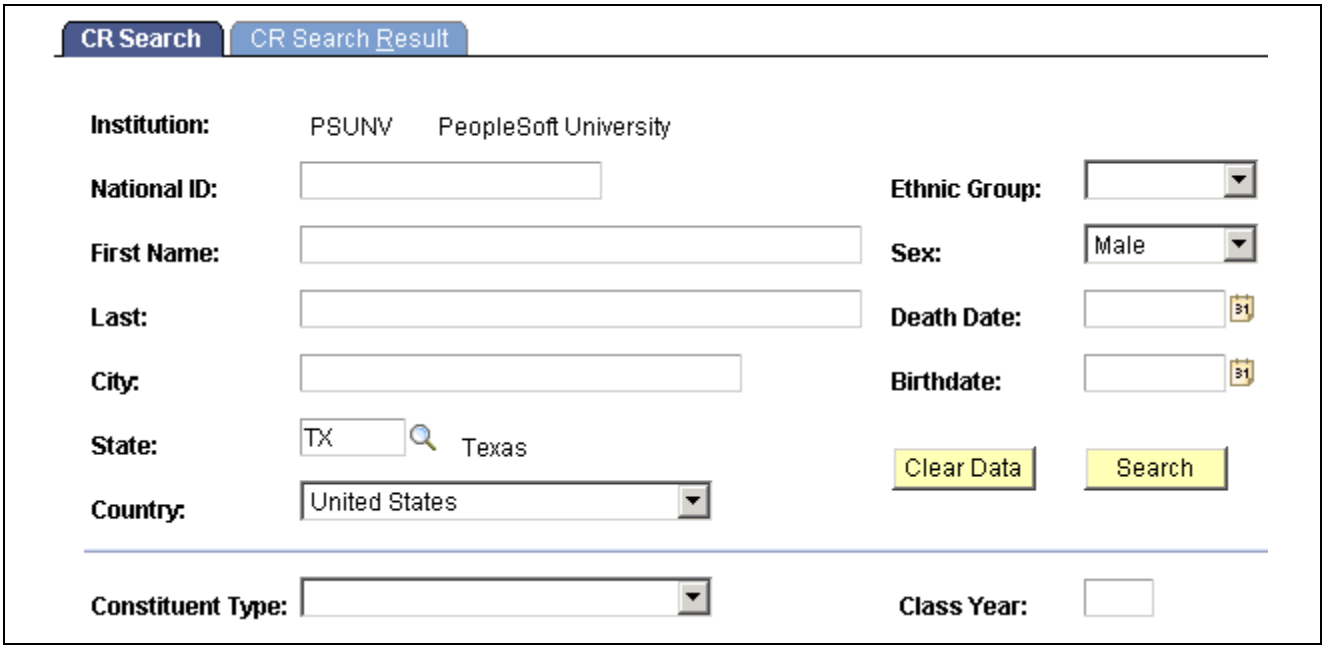
To avoid entering duplicate personal records, use the Search/Match functionality any time that you are entering a new person in the database. Search/Match criteria is utilized when you save a *new* person, but if a potential duplicate is detected, use Search/Match anyway to investigate the existing person record(s). Start with Search/Match to look for the person before adding them to the database. Search/Match also is used to search for external organizations.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Setting Up Search/Match"

Searching for People

Access the CR Search page.



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.

State Select a state; the available list corresponds to the selected country.

Note. If you change the value in the Country field, the State field becomes blank.

Country The system populates this field by default with the country value from the Country Specific installation page.

Class Year Select the class year of the constituent.

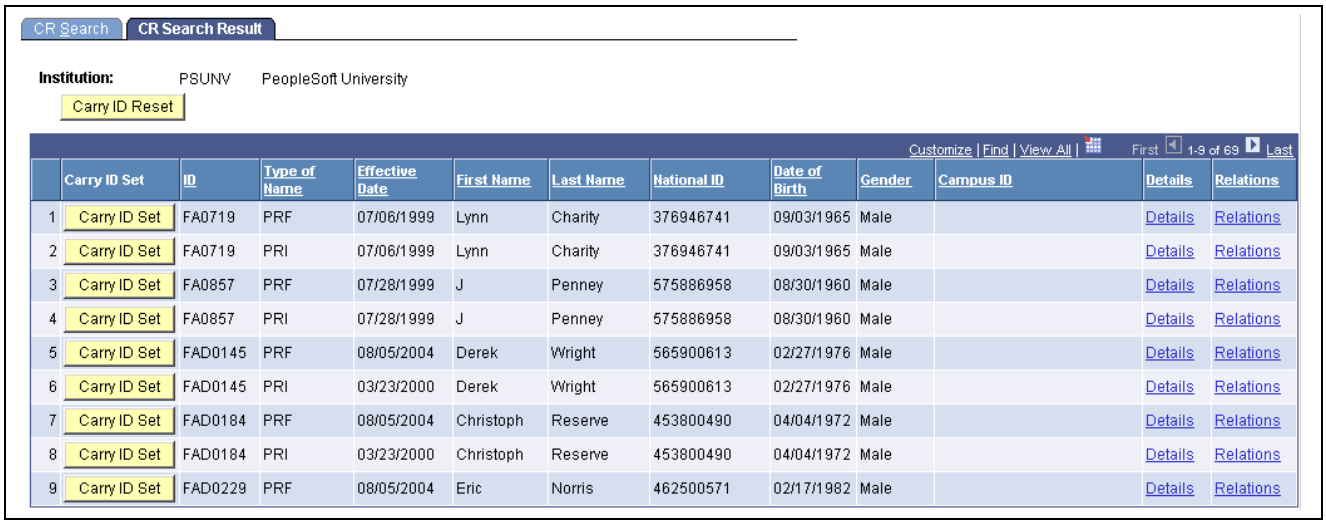
Clear Data Click to clear the selections on the page.

Search Click to retrieve a list of constituents that match your selection criteria; the system displays results 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 Search Results

After entering selection criteria on the CR Search page, access the CR Search Result page.



	Carry ID Set	ID	Type of Name	Effective Date	First Name	Last Name	National ID	Date of Birth	Gender	Campus ID	Details	Relations
1	Carry ID Set	FA0719	PRF	07/06/1999	Lynn	Charity	376946741	09/03/1965	Male		Details	Relations
2	Carry ID Set	FA0719	PRI	07/06/1999	Lynn	Charity	376946741	09/03/1965	Male		Details	Relations
3	Carry ID Set	FA0857	PRF	07/28/1999	J	Penney	575886958	08/30/1960	Male		Details	Relations
4	Carry ID Set	FA0857	PRI	07/28/1999	J	Penney	575886958	08/30/1960	Male		Details	Relations
5	Carry ID Set	FAD0145	PRF	08/05/2004	Derek	Wright	565900613	02/27/1976	Male		Details	Relations
6	Carry ID Set	FAD0145	PRI	03/23/2000	Derek	Wright	565900613	02/27/1976	Male		Details	Relations
7	Carry ID Set	FAD0184	PRF	08/05/2004	Christoph	Reserve	453800490	04/04/1972	Male		Details	Relations
8	Carry ID Set	FAD0184	PRI	03/23/2000	Christoph	Reserve	453800490	04/04/1972	Male		Details	Relations
9	Carry ID Set	FAD0229	PRF	08/05/2004	Eric	Norris	462500571	02/17/1982	Male		Details	Relations

CR Search Result page

Carry ID Reset Click to cancel any selections that you have made by using the Carry ID Set button.

Carry ID Set Click to set this record as the default when opening pages in Contributor Relations.

L A E F P S I Indicate the person's relationship to your institution. Values are:

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 Also

Chapter 8, "Managing Constituent Data," Searching for People, page 123

Adding People to the System

This section discusses how to add people to the system. These pages maintain all biographical information about the constituent.

Note. Contributor Relations uses Campus Community pages to maintain biographical information.

See *PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook*, "Adding a Person in PeopleSoft Enterprise Campus Solutions".

Pages Used to Add People to the System

Page Name	Object Name	Navigation	Usage
Biographical Details	SCC_BIO_DEMO_PERS	Contributor Relations, Constituent Information, People, Add/Update a Person, Biographical Details	Enter biographical information, such as name, addresses, phone, email, gender, citizenship information, and marital status.
Regional	SCC_BIO_DEMO_REG	Contributor Relations, Constituent Information, People, Add/Update a Person, Regional	Enter regional biographical information, organized by country.

Managing Addresses and Phone Numbers

This section discusses how to:

- Update linked addresses.
- Review address data.
- Enter electronic addresses.

Note. Contributor Relations uses 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	Campus Community, Personal Information, Biodemo Processes, Update Linked Addresses	Update linked addresses.
Addresses	ADDRESSES_89	Campus Community, Personal Information, Biographical, Addresses/Phones, Addresses	View or update a list of all addresses in the system for an individual.
Electronic Addresses	E_ADDR_PERS	Campus Community, Personal Information, Biographical, Addresses/Phones, Electronic Addresses	Enter or review email and URL addresses for an individual.
Seasonal Addresses	CC_ADDR_SEASONAL	Campus Community, Personal Information, Biographical, Addresses/Phones, Seasonal Addresses	Enter or review seasonal addresses for an individual.
Phones	PHONE_PERS	Campus Community, Personal Information, Biographical, Addresses/Phones, Phones	Enter or review phone details for an individual.

Updating Linked Addresses

When you update the address for someone who is linked to an individual, the address for the linked entity is not changed in the database on the Addresses page for the primary individual until you run the Update Linked Addresses process. When you run the process, the system finds the primary individual and updates the address data.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Biographical Information," Updating Linked Addresses

Reviewing Address Data

Access the Addresses page to view information about a constituent who is a person.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Biographical Information," Entering Addresses for an Individual

Entering Electronic Addresses

Access the Electronic Addresses page to maintain information about a constituent's email and URL addresses. You can specify a type for each address, such as work and home.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Biographical Information," Entering Electronic Address Data

Tracking External System IDs

Use the External System IDs page to track constituent IDs by a number other than the Contributor Relations ID.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing IDs," Changing Individual 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 Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Biographical Information," Managing Names Data

Maintaining Constituent Types

This section provides an overview of constituent types and discusses how to assign constituent types.

Understanding Constituent Types

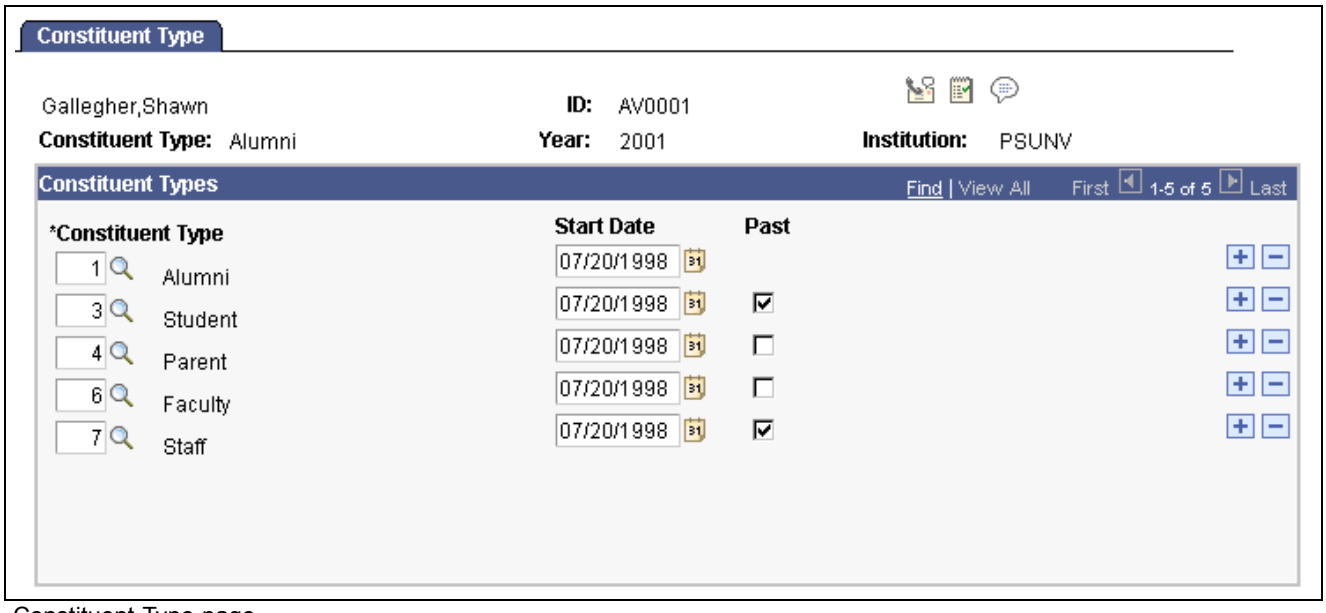
Constituent types are the relationships that exist between a constituent and your institution. Constituent types are used extensively in reporting and in completing many business processes.

Pages Used to Maintain Constituent Types

Page Name	Object Name	Navigation	Usage
Constituent Type	AV_CNST_TYPE_TBL, AV_CNST_TYPE_TBL_W	• Contributor Relations, Constituent Information, People, Relationships, Constituent Types • Contributor Relations, Constituent Information, Workset, Workset Constituent Info, Relationships - Workset, Constituent Types - Workset	Assign constituent types to a constituent.
Constituent Type Summary	AV_CNST_TYPE_INQ, AV_CNST_TYPE_INQ_W	• Contributor Relations, Constituent Information, People, Relationships, Constituent Type Summary • Contributor Relations, Constituent Information, Workset, Workset Constituent Info, 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 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 has a value of *Parent,* and the child graduates, select the Past option for the constituent type of *Parent.*

Note. When constituent types are assigned to a constituent, you cannot delete the last remaining constituent type assignment. For example, if a constituent is assigned values of *Alumni* and *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 Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Biographical Information," Entering Religious Preferences

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 Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Identification Data," Entering Photographs

Adding Constituent Types to Graduates

This section discusses how to run the Graduates to Alumni Application Engine process (AV_CONF_ALUM).

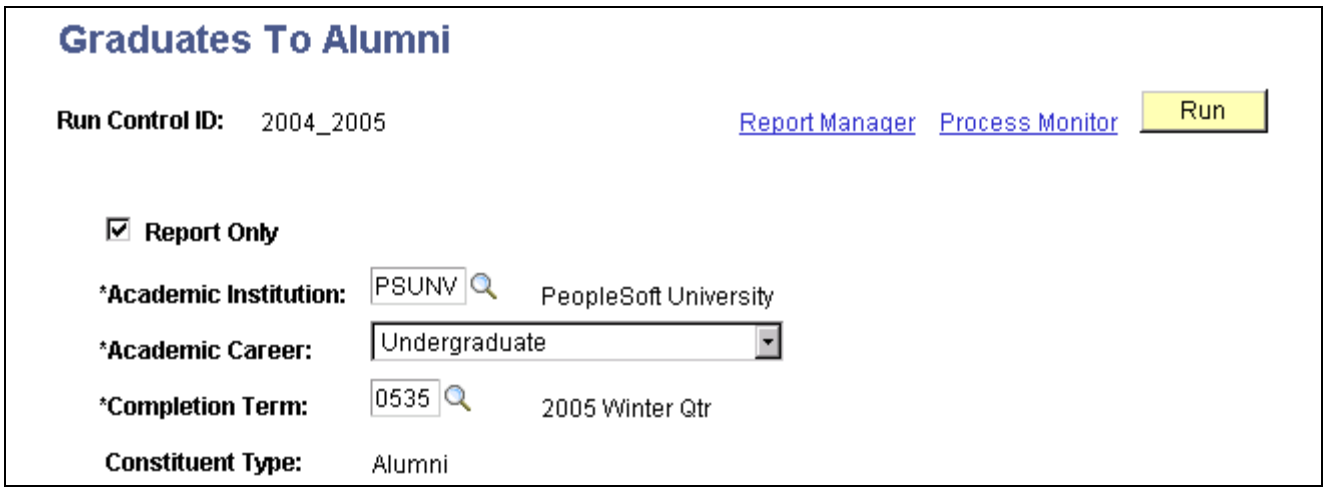
Contributor Relations provides a job process that searches for a group of graduates and adds to their records a constituent type of *Alumni,* based on each graduate's program completion date. Running the process also generates a report that lists the search results and notes any record changes.

Page Used to Add Constituent Types to Graduates

Page Name	Object Name	Navigation	Usage
Graduates To Alumni	AV_RUNCTL_CONFR	Contributor Relations, Constituent Information, People, Process, Graduates to Alumni	Run the process that adds a constituent type of *Alumni* to a graduate. The criteria entered on this page determine which graduates are selected for the process.

Running the Graduates to Alumni Process

Access the Graduates To Alumni page.



Graduates To Alumni page

Report Only Select to generate the Graduates To Alumni report (AV702) without making any changes to the Constituent Type table (PS_AV_CNST_TYP_TBL). Clear to both generate the report and add the graduates to the Constituent Type table with a constituent type of *Alumni.*

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 granted or will be granted their degrees. These values are defined by the institution.

Constituent Type

Note. Displays *Alumni,* the only constituent type that is assigned by this process.

When users run this process, the system does the following:

1. Gathers all records that meet the institution, academic career, and completion term criteria from the Graduates to Alumni page, where the value in the Degree Confer Date field is not ‘Null’ and the value in the Degree Status field is *Active.*
2. Determines whether these records already have a constituent type of *Alumni*.
3. If the Report Only check box is cleared, the system updates the Constituent Type table 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 is selected, the system generates the Graduates To Alumni report AV702.

See Also

Chapter 4, “Setting Up Constituent Data,” Defining Constituent Types, page 26

Chapter 8, “Managing Constituent Data,” Assigning Constituent Types, page 128

PeopleSoft Enterprise Student Records 8.9 PeopleBook, “Graduating Students”

Appendix C, “PeopleSoft Contributor Relations Reports,” Contributor Relations Reports: Selected Reports, page 518

Maintaining Degree Information

This section discusses how to:

- Maintain external degree information.
- Set a constituent’s preferred year.
- Enter internal legacy degree information.

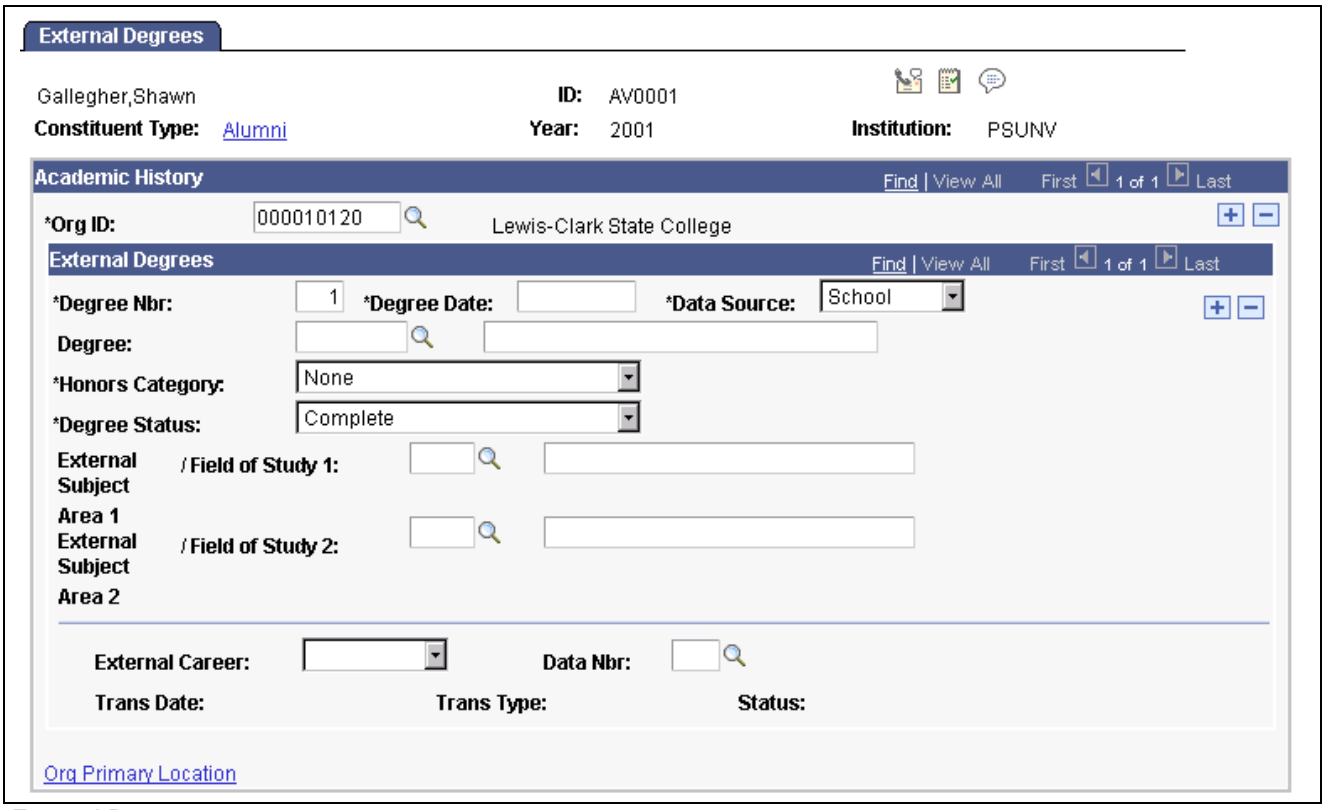
The system enables you to enter and track external degree information, or information about degrees earned from institutions other than your own. In addition, you can view information about both internal and external degrees.

Pages Used to Maintain Degree Information

Page Name	Object Name	Navigation	Usage
External Degrees	AV_EXT_DEGR, AV_EXT_DEGR_W	Contributor Relations, Constituent Information, People, Academic Information, External Degrees	Add information about degrees that a constituent earned at institutions other than your own.
Internal Degrees	AV_INT_DGR_INQ	Contributor Relations, Constituent Information, People, Academic Information, Academic Information Summary, Internal Degrees	View information about degrees that a constituent has earned from your institution.
Internal Legacy Degrees	AV_LEGACY_DEG_INQ	Contributor Relations, Constituent Information, People, Academic Information, Academic Information Summary, Internal Legacy Degrees	View information about degrees that a constituent earned at your institution. Legacy degree information is information that's converted from your previous system. Therefore, a complete academic record does not exist in the Campus Solutions system for these degrees.
External Degrees	AV_EXT_DEGREE	Contributor Relations, Constituent Information, People, Academic Information, Academic Information Summary, External Degrees	View information about degrees that a constituent earns at institutions other than your own.
Preferred Class Year	AV_INT_DEGREE	Contributor Relations, Constituent Information, People, Academic Information, 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.
Internal Legacy Degrees	AV_LEGACY_DEG	Contributor Relations, Constituent Information, People, Academic Information, 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 page

Org ID Select the institution from which the constituent earned the external degree.

Degree Nbr (degree number) This value is automatically calculated by the system. The first record that 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 the 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 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 the system as translate values. You can modify these translate values.

Degree Status Select the current status of the degree. Degree statuses are delivered with the system as translate values. You can modify these translate values.

External Subject Area/Field of Study If there are subject areas or fields on which the constituent concentrated for this degree, enter them in these fields. You may prompt on these fields to access values from the External Subject table. Or, if you prefer to enter an external subject area that is not defined in the system, leave the field blank, tab to the related description field, and enter any text.

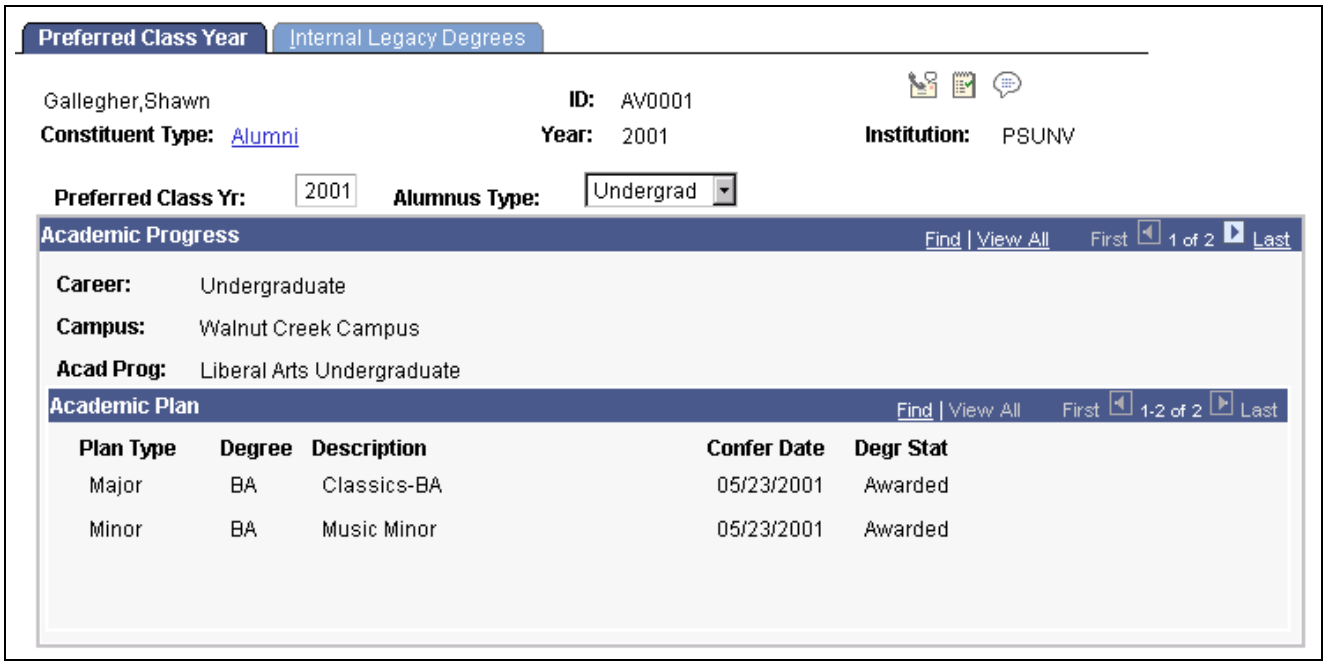
External Career Select any external careers for the constituent. External careers are delivered with the system as translate values. You can modify these translate values.

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 the 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 page

Preferred Class Yr (preferred class year) Enter the year that the constituent wants to use as class year. For example, a constituent with both an undergraduate and graduate degree may prefer to use the 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 the system. Values are:

G: Graduate.

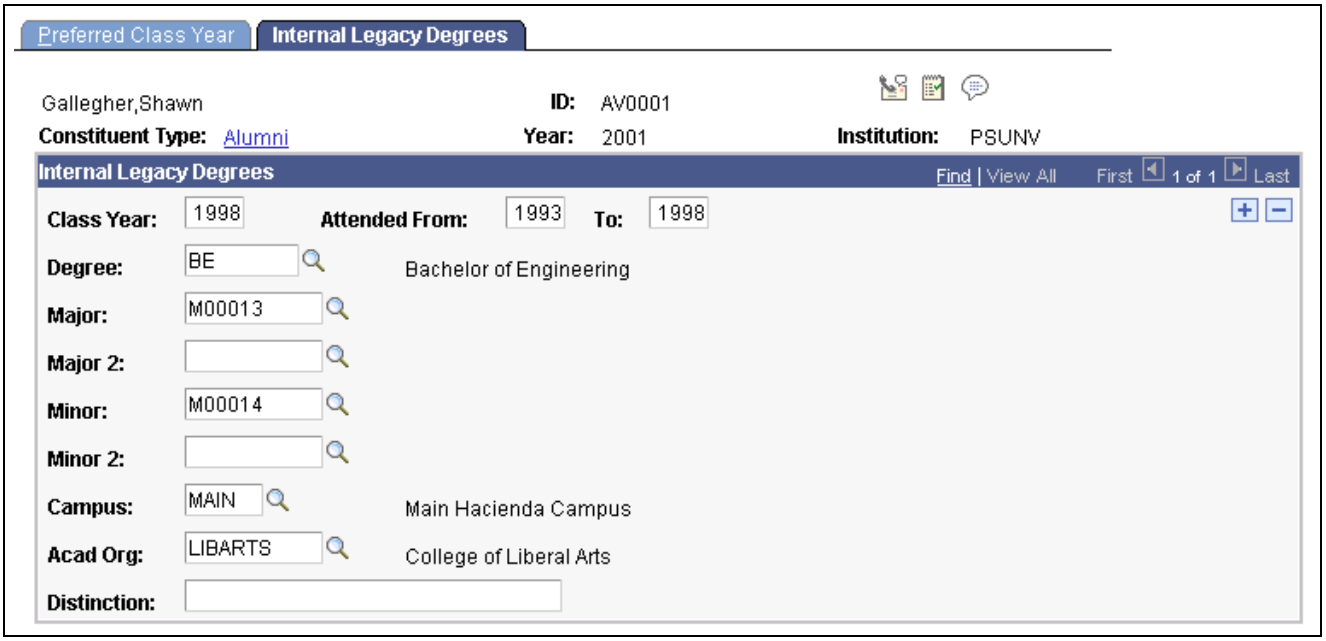
N: Non-degree.

U: Undergraduate.

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.



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 the PeopleSoft Enterprise 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	• Contributor Relations, Constituent Information, People, Relationships, Work Experience • Contributor Relations, Constituent Information, Workset, Workset Constituent Info, Work Experience - Workset	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 the system.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Adding Organizations to Your Database"

Entering Location Data for Organizations

Use the Organization Locations component to enter information regarding the addresses and phone numbers of the organizations in the system. Organization locations should be entered before organization departments and organization contacts.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 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 Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Organization Data," Entering Organization Department Data

Entering Contact Data for Organizations

Use the Organization Contacts component to maintain information about the contacts that 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 Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Organization Data," Entering Organization Contact Data

Maintaining Organization Financial Information

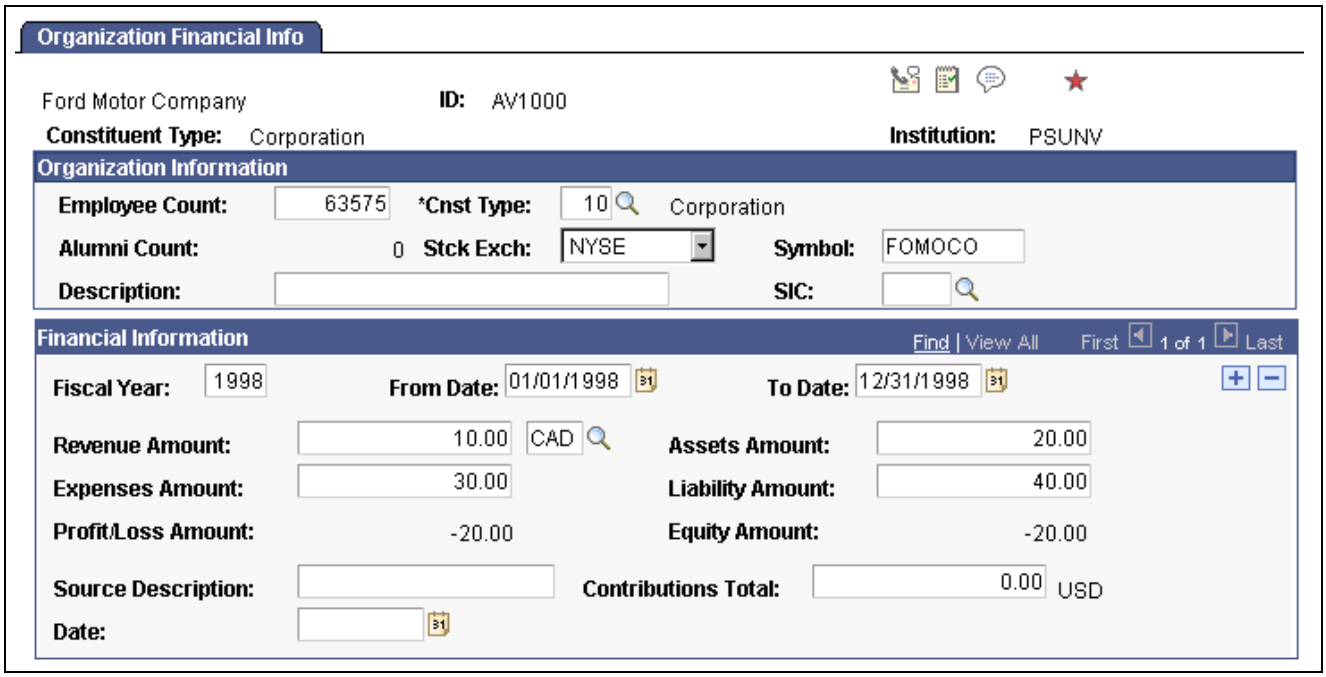
This section discusses how to enter organization financial information.

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	• Contributor Relations, Constituent Information, Organization, Organization Information, Organization Financial Info • Contributor Relations, Constituent Information, Workset, Workset Constituent Info, Organization Financial Info	Maintain information about an organization's financial history and other statistical information.

Entering Organization Financial Information

Access the Organization Financial Info page.



Organization Financial Info

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 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 Date that define the fiscal year that you selected. The 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, the system calculates conversion based on the exchange rates on the date in the To Date field.

Revenue Amount Enter the total amount that 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 system converts the values by using the exchange rate that is in effect on the date that you selected. The button label changes to Entry. Click the button again to toggle back to entry mode, where you can change the values.

Expenses Amount	Enter the total amount that the organization incurred as expenses during the fiscal year.
Profit/Loss Amount	Displays the organization's profit or loss for the fiscal year that 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 that you entered, based on assets minus liability.
Source Description and **Date**	Enter the person or publication that provides 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 and 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 that the organization has.

See Also

Chapter 7, "Setting Up Commitment Management," Defining an Organization's Matching Gift Rules, page 97

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 that the organization has.

See Also

Chapter 18, "Processing Commitments," Viewing an Organization's Matching Gift Rules, page 424

Reviewing Organization Data

When you have entered the organization, location, department, and contact information for an organization, you can review that information quickly and easily through Campus Community pages.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Organization Data," Reviewing Organization Data

Viewing an Organization's Employee List

This section discusses how to view employee lists.

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	• Contributor Relations, Constituent Information, External Organizations, Relationships, Employee List • Contributor Relations, Constituent Information, Workset, Workset Constituent Info, Employee List	View a list of all the constituents in the system who are 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 21

Viewing Profiles

Profiles for people and organizations enable you to view a summary of information in the system about a particular constituent. The system includes both a Person Profile and an Organization Profile page.

This section provides an overview of person profile views and discusses how to:

- View general person profile information.
- View a biographic profile.
- View a commitment profile.
- View a participation profile.

- View an organizational profile.

Understanding Person Profile Views

Each profile view contains several data regions with summary information. This table lists each data region and the profile view that contains it:

Data Region	Profile View
Address	Biographic
Phone / E-mail	Biographic
Biographic Information	Biographic
Work Experience	Biographic
Relationships	Biographic
Lifetime Giving	Commitment
Historical Giving	Commitment
Involvement	Participation
Volunteer Activities	Participation
Memberships	Participation

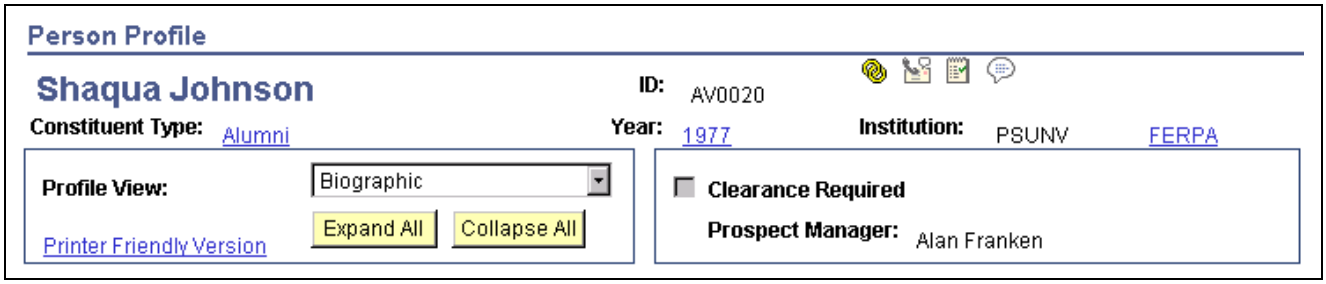
As you collapse and expand each profile view, the system populates the data regions within the view.

Pages Used to View Profiles

Page Name	Object Name	Navigation	Usage
Person Profile	AV_PRSN_PROFILE, AV_PRSN_PROFILE_W	• Contributor Relations, Constituent Information, People, Person Profile • Contributor Relations, Constituent Information, Workset, Workset Constituent Info, Person Profile - Workset • Self Service, Outreach, View Prsn, Person Profile • Self Service, Outreach, 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	• Contributor Relations, Constituent Information, External Organizations, Organization Profile • Contributor Relations, Constituent Information, Workset, Workset Constituent Info, Organization Profile	View summary information about a constituent that is an organization.
Primary Location	AV_ORG_PROFILE2, AV_ORG_PROFILE2_W	• Contributor Relations, Constituent Information, External Organizations, Organization Profile, Primary Location • Contributor Relations, Constituent Information, Workset, Workset Constituent Info, Organization Profile, Primary Location	View information about an organization's primary location.

Viewing General Person Profile Information

Access the Person Profile page.



Person Profile page (1 of 4)

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.

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 If academic information exists for the constituent in the system, the class year appears as a link. Click the link to access the Academic Information inquiry component.

If no class year exists, but the system has academic information for the constituent, *None* appears here as a link. Click the link to access the Academic Information inquiry component.

FERPA Click to access the FERPA display component, which lists the constituent's personal data and specifies which information can be released.

Profile View Select a profile view—*Biographic, Commitment,* or *Participation*—to expand it below and populate its data regions. Click the arrow next to the region's name to expand or collapse data regions manually.

Printer Friendly Version Click to access a read-only version of the page that expands all rows of all populated data regions. You can print this page by using your browser's print functionality.

Click the Return button to return to the Person Profile page.

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 Displays the name of the constituent's assigned prospect manager. Prospect managers are assigned on the Staff Assignment, Volunteer Assignment, and Unit Assignment pages.

If the prospect manager has an active email address on the Electronic Addresses page, the name appears as a link. Click the link to launch your email application and send a message to that person.

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.

Data Region	Condition	Message
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:

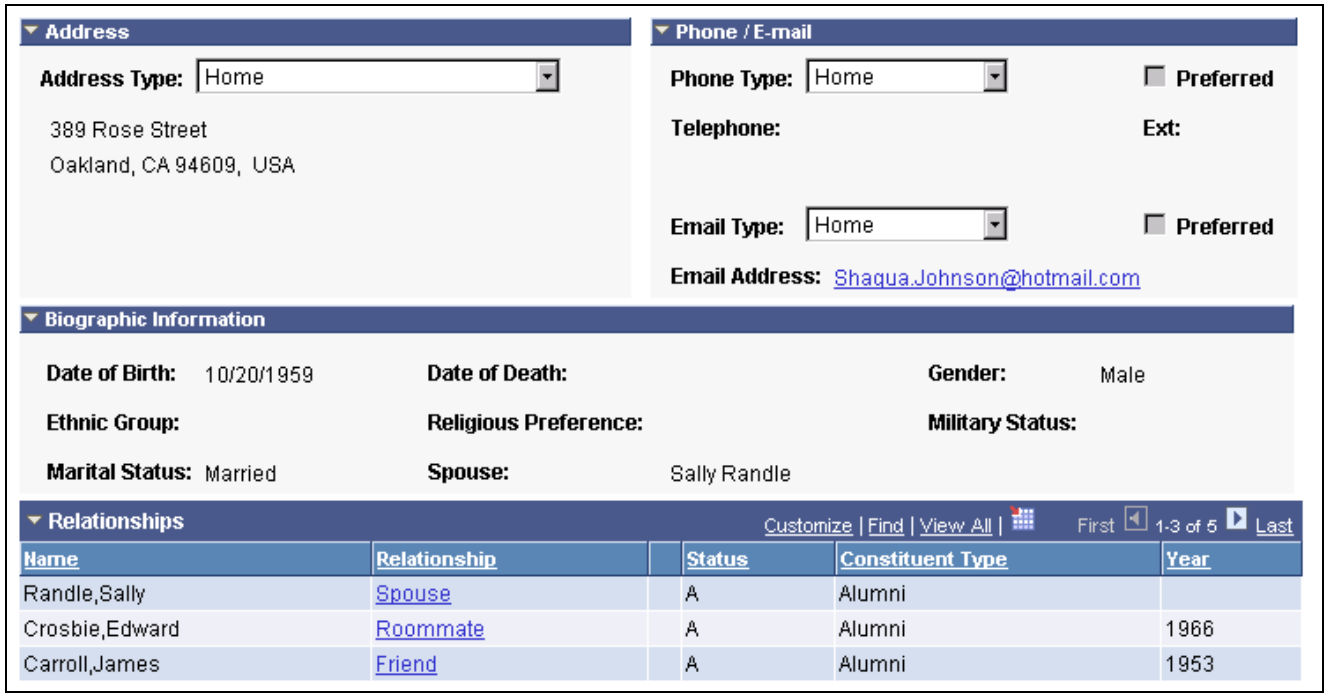
Additional Information	Condition	Message
Academic Information	No data exists, and the Class Year link is inactive.	No Academic Information on file.
Planned Giving	No data exists.	No Planned Giving Donor information on file.
	Data exists.	Planned Giving Donor information on file.
Ratings	No data exists.	No Ratings information on file.
	Data exists.	Ratings information on file.
Assigned Resources	No data exists.	No Resources are assigned to constituent.
	Data exists.	Resources are assigned to constituent.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing FERPA Privacy Control"

Viewing a Biographic Profile

Access the Person Profile page, Biographic Profile view.



Person Profile page (2 of 4)

This table lists the information sections in this view and the pages from which the system derives the information:

Information Section	Page
Address	Addresses
Phone / E-mail	Phone Numbers Electronic Addresses
Biographic Information	Bio/Demo Data Religious Preferences Relationships Decedent Data

Information Section	Page
Work Experience	Work Experience
Relationships	Relationships Person to Org Relationships

Address

Address Type Select the type of address that you want to display.

Phone / E-mail

Phone Type, Email Type Select the types of phone and email address information that you want to display.

Email Address If the constituent has an active email address in the system, it appears as a link. Click the link to launch your email application and send a message to the constituent.

Biographic Information

This data region displays compiled biographical 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 8, "Managing Constituent Data," Maintaining Work Experience Information, page 135

Chapter 8, "Managing Constituent Data," Establishing Relationships, page 155

Viewing a Commitment Profile

Access the Person Profile page, Commitment Profile view.



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

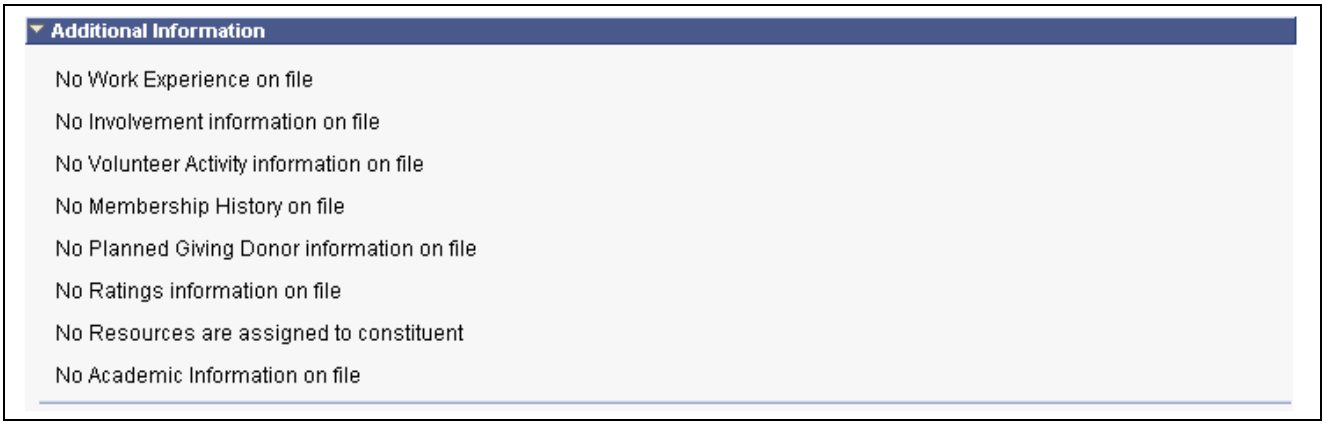
Total Year-to-Date Giving Click to access the Giving Profile page for the constituent.

See Also

Chapter 19, “Analyzing Giving History,” Analyzing Donor History, page 437

Viewing a Participation Profile

Access the Person Profile page, Participation Profile view.



Person Profile page (4 of 4)

This 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

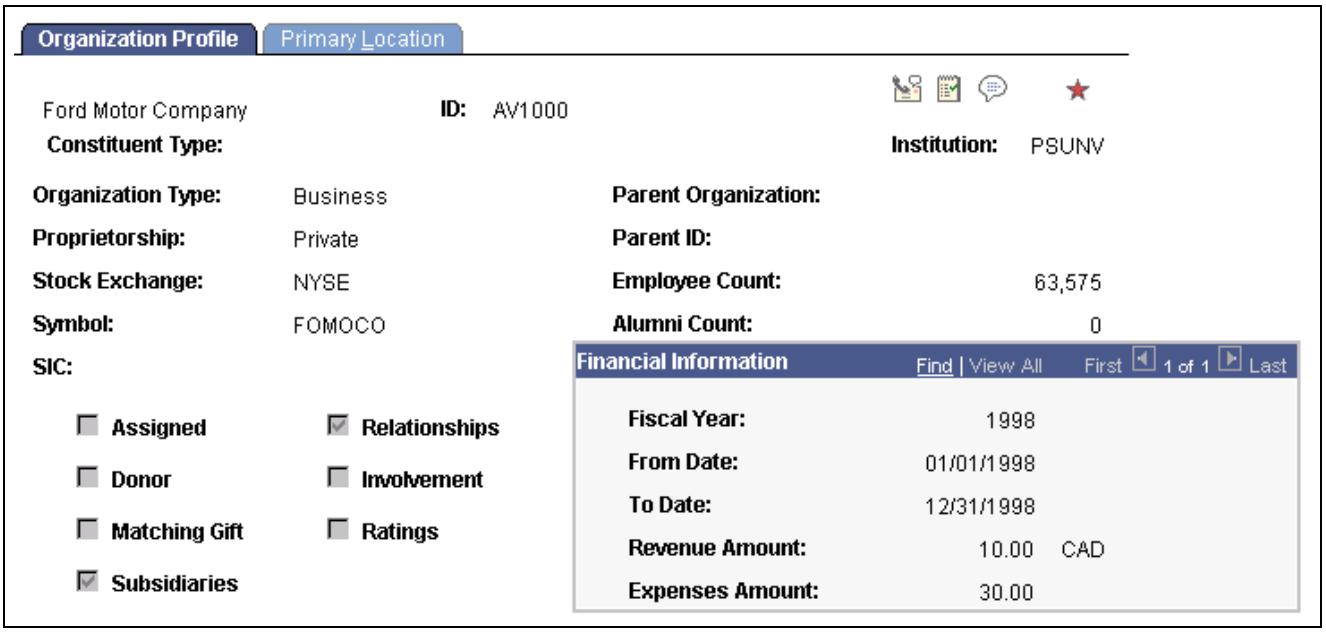
Chapter 8, “Managing Constituent Data,” Maintaining Involvement Information, page 151

Chapter 14, “Managing Volunteers,” Reviewing Volunteer History, page 312

Chapter 13, “Managing Membership,” Viewing Membership History, page 300

Viewing an Organizational Profile

Access the Organization Profile page.



Organization Profile page

Assigned If selected, indicates that the organization is assigned to one or more staff members, volunteers, or units.

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 8, "Managing Constituent Data," Maintaining Organization Financial Information, page 137

Updating a Donor's Record or 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 17, "Entering Commitments," Updating or Adding a Constituent Who is a Person, page 344

Chapter 17, "Entering Commitments," Updating or Adding a Constituent Who is an Organization, page 345

Viewing a Constituent's Audience History

This section discusses how to review audience history.

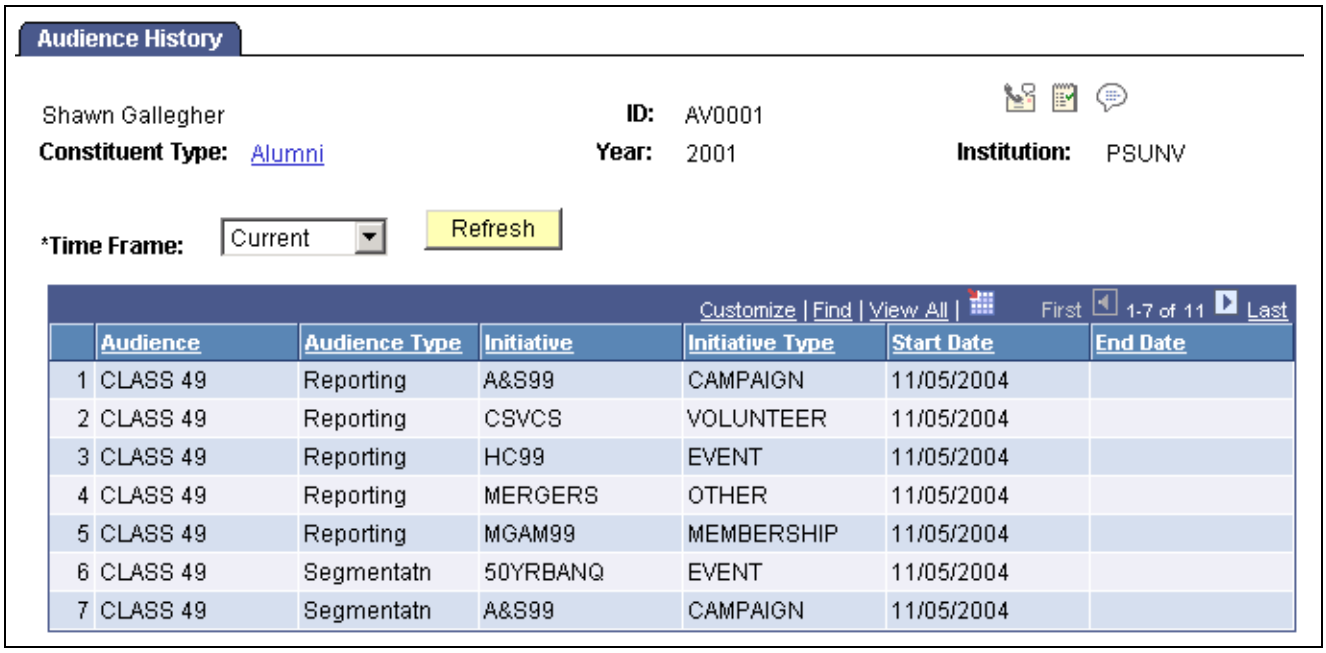
Note. Separate Update Information pages exist for donors who are people and donors that are organizations.

Page Used to View a Constituent's Audience History

Page Name	Object Name	Navigation	Usage
Audience History	AV_AUD_HISTORY, AV_AUD_HISTORY_E	• Contributor Relations, Constituent Information, People, Participation, Audience History • Contributor Relations, Constituent Information, External Organizations, Participation, Audience History	Assess the ways in which a constituent is being solicited. This page displays all the target audiences to which the constituent 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 who have an involvement of *GOLF*.

Reviewing Audience History

Access the Audience History page.



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 *Administration, Segmentation,* or *Reporting.*

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 of involvement and discusses how to:

- Add involvement records.
- Filter involvement records.
- Create an involvement roster.

Understanding Involvement

The Involvement component of 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

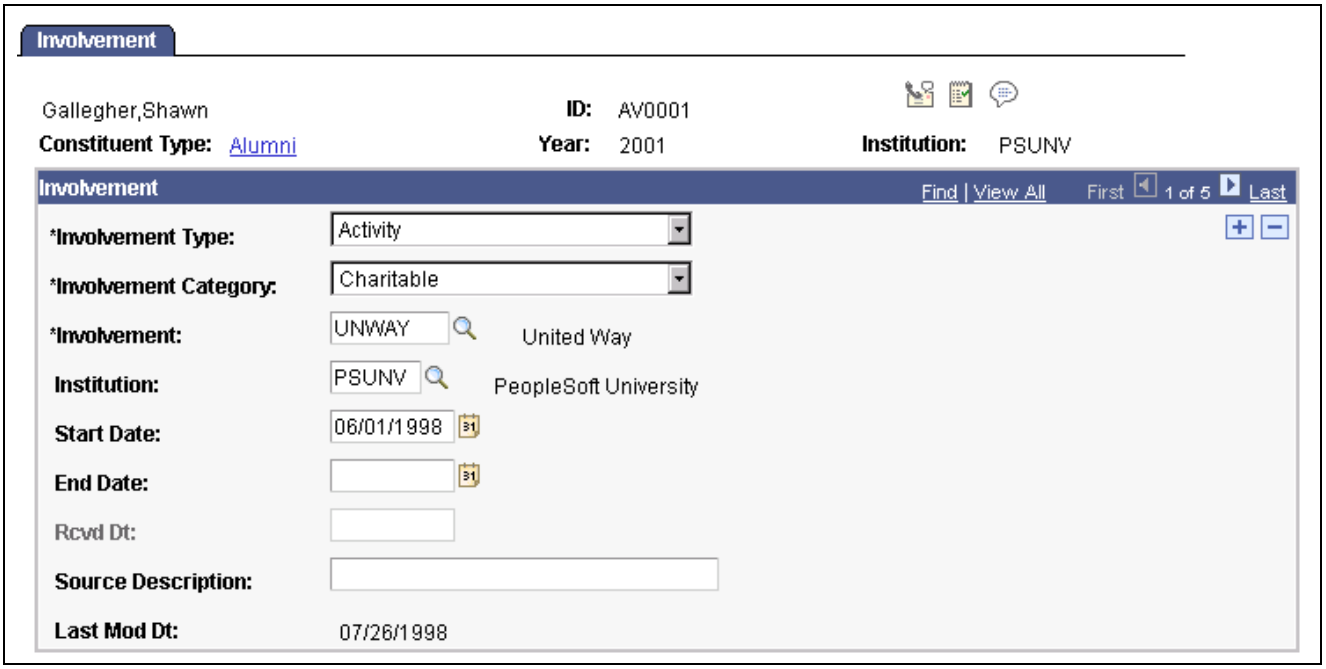
Page Name	Object Name	Navigation	Usage
Involvement	AV_INVLV, AV_INVLV_E, AV_INVLV_W	• Contributor Relations, Constituent Information, People, Biographic Information, Involvement • Contributor Relations, Constituent Information, External Organizations, Participation, Involvement • Contributor Relations, Constituent Information, Workset, Involvement	Add new involvement records for a constituent.

Page Name	Object Name	Navigation	Usage
Involvement Filter	AV_INVLV_FLTR, AV_INVLV_FLTR_E, AV_INVLV_FLTR_W	• Contributor Relations, Constituent Information, People, View Person Information, Participation, Involvement Summary, Involvement Filter • Contributor Relations, Constituent Information, External Organizations, Participation, Involvement Summary, Involvement Filter • Contributor Relations, Constituent Information, Workset, Workset Constituent Info, Involvement Summary, Involvement Filter	Filter the types of involvement that you view on the Involvement Summary page.
Involvement Summary	AV_INVLV_SMRY, AV_INVLV_SMRY_E, AV_INVLV_SMRY_W	• Click the Search button on the Involvement Filter page. • Contributor Relations, Constituent Information, People, Participation, Involvement Summary, Involvement Summary • Contributor Relations, Constituent Information, External Organizations, Participation, Involvement Summary • Contributor Relations, Constituent Information, Workset, Workset Constituent Info, Involvement Summary, Involvement Summary	View a list of the involvement records that match the filter criteria that you specify on the Involvement Filter page.
Involvement Detail	AV_INVLV_DTL_SP	• 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.

Page Name	Object Name	Navigation	Usage
Roster Filter	AV_I_INVLV_FLTR	Contributor Relations, CR Reports, 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	Contributor Relations, CR Reports, Involvement Roster, Roster List	View a list of the constituents who share a common involvement based on the selections that you made on the Involvement Roster page.

Adding Involvement Records

Access the Involvement page.



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. 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.

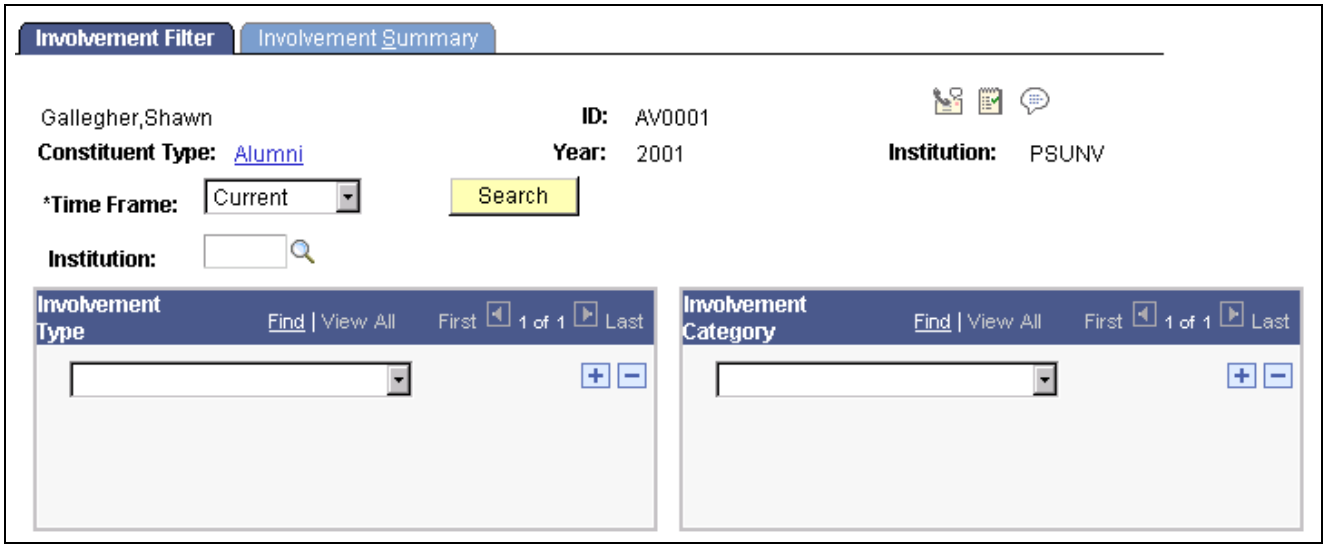
Rcvd Dt (received date) If the involvement type is *Award and Honor* or another type that requires a received date rather than a date range, enter the date in the Rcvd Dt field. Make this determination when defining involvement types.

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.



Involvement Filter page

Institution Select the institution for which you want to view involvement information.

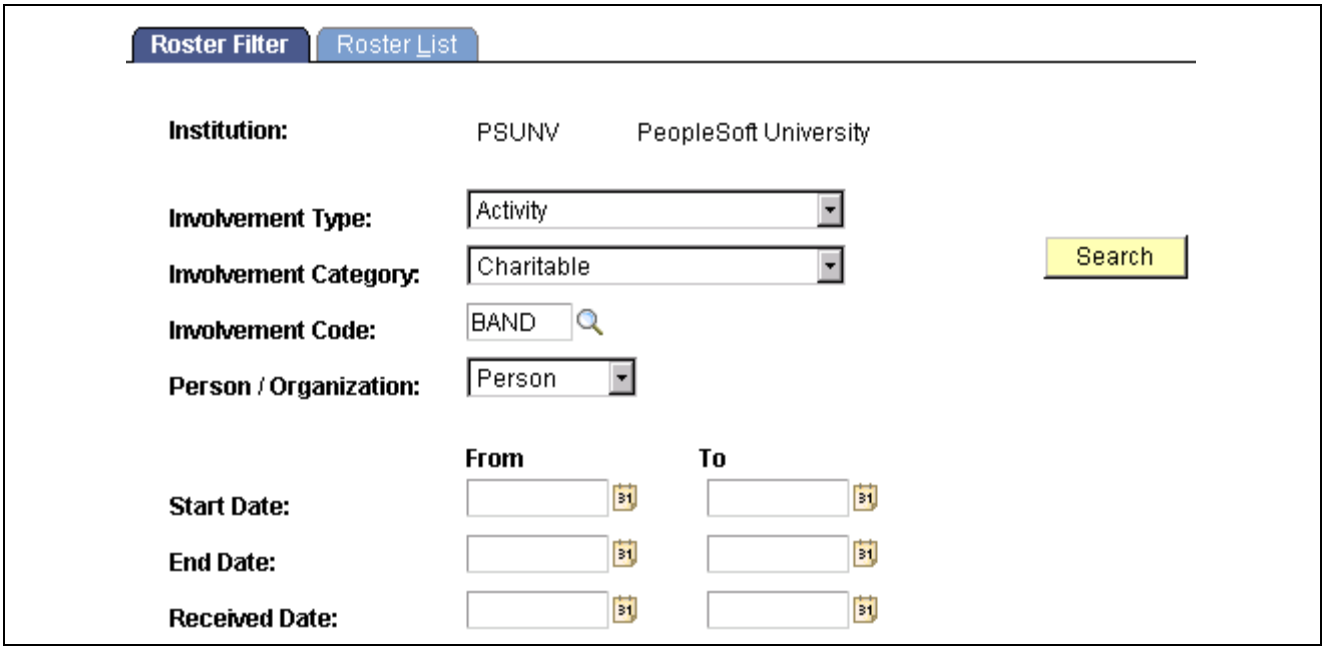
Involvement Type Select the involvement types about which you want to view information on the Involvement Summary page.

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 that match the criteria that you selected on the Involvement Summary page.

Creating an Involvement Roster

Access the Roster Filter page.



Roster Filter page

Involvement Type Select the involvement type for which you want to create a roster. Valid involvement types are *Interest, Activity, Affiliation,* and *Award and Honor.*

Involvement Category Select the involvement category for which you want to create a roster. Involvement categories describe the nature of the involvement, such as *Professional, Political, Charitable,* 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 *Golf, Hunting, Dancing, Kiwanis Club,* 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 that 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 21

Establishing Relationships

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

- Establish a person to person relationship.
- Establish an organization to organization relationship.
- Establish a person to organization relationship.
- Establish an organization to person relationship.

Understanding Relationships

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

The relationships that you establish can be reciprocal—that is, when you indicate a relationship in one record, the system creates the relationship in 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 system automatically creates the corresponding relationship in Ford Motor Company's record.

Common Elements Used in This Section

Relationship Nbr (relationship number) — The system automatically generates a relationship number when you establish and save a relationship.

Related ID — Enter the ID of the person or organization to which this constituent is related. Select a related ID if the organization exists in the system.

Relationship — Select the nature of the relationship, such as person to organization, organization to organization, or organization to person. Relationship types are shipped with the system as translate values. Do not modify these translate values. Any modifications to these values requires substantial programming.

Source Description — Enter the name of the person or publication that provides your institution with information about this relationship.

Pages Used to Establish Relationships

Page Name	Object Name	Navigation	Usage
Relationships	AV_RELATIONSHIPS_E	Contributor Relations, Constituent Information, External Organizations, Relationships, Org to Org Relationships	Record information about a relationship between two organizations.
Address Detail	AV_ADDRESS_SP, AV_ADDRESS_2_SP	You can access the Address Detail page through multiple navigation paths. A frequently used path is: Click the Address link on the Relationships page.	Enter and view address information for a person or organization for which no record exists in the system.
Person to Org Relationships	AV_RELATION_PE	Contributor Relations, People, Relationships, Person to 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.

Page Name	Object Name	Navigation	Usage
Org to Person Relationships	AV_RELATION_EP	Contributor Relations, External Organizations, Relationships, Org to 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_CNST_RELATION, AV_CNST_RELATION_W	Contributor Relations, Constituent Information, Workset, Workset Constituent Info, Relationships - Workset, Relationship Summary - Workset	View information about the relationships that a person has with other people and organizations.
Relationship Detail	AV_RELATE_E_SP, AV_RELATION_EP_SP, AV_RELATION_PE_SP	Click the Details button on the Relationship Summary page.	View additional information about a particular relationship, such as relationship begin and end dates, address information, and comments.
Org Relationship Summary	AV_ORG_RELATION, AV_ORG_RELATION_W	• Contributor Relations, Constituent Information, External Organizations, Relationships, Relationship Summary • Contributor Relations, Constituent Information, Workset, Workset Constituent Info, Relationships - Workset, Org Relationship Summary - WS	View information about the relationships that an organization has with other people and organizations.

Establishing a Person to Person Relationship

Access the Relationships page.

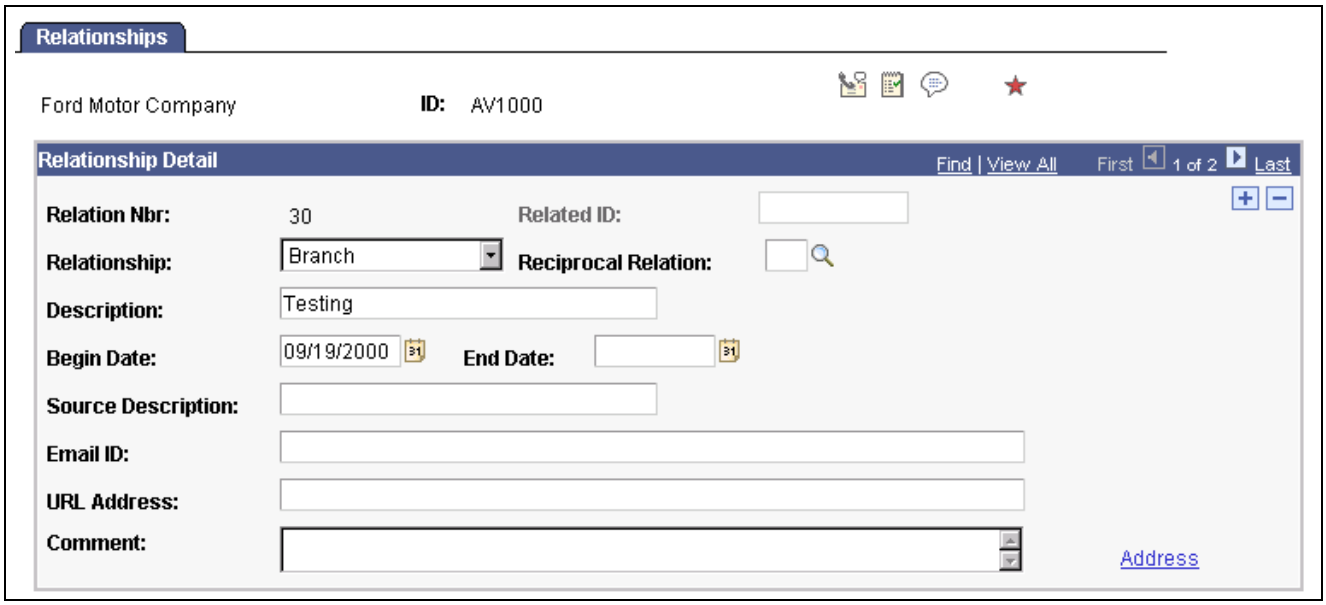
Use the Relationships page to record information about relationships between two people.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Biographical Information," Managing Relationships Data

Establishing an Organization to Organization Relationship

Access the Relationships page.



Relationships page

Reciprocal Relation Select the corresponding relationship. For example, if an organization is a parent company, the reciprocal relation might be *Subsidiary*. You define reciprocal relations using the Reciprocal Relationship page.

Description If you do not select a related ID, enter the name of the related organization. If you select a related ID, the name of the organization appears.

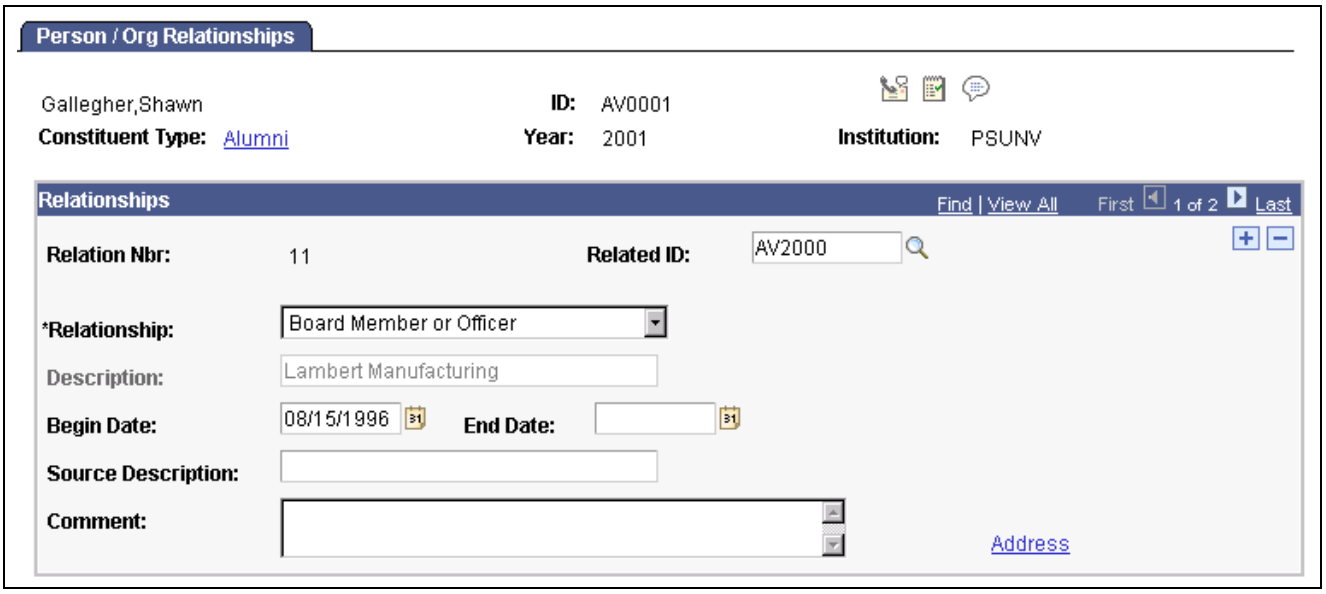
Address If the related organization does not have an ID in the system, click to enter address information on the Address Detail page.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Biographical Information," Managing Addresses and Phone Data

Establishing a Person to Organization Relationship

Access the Person/Org Relationships page.



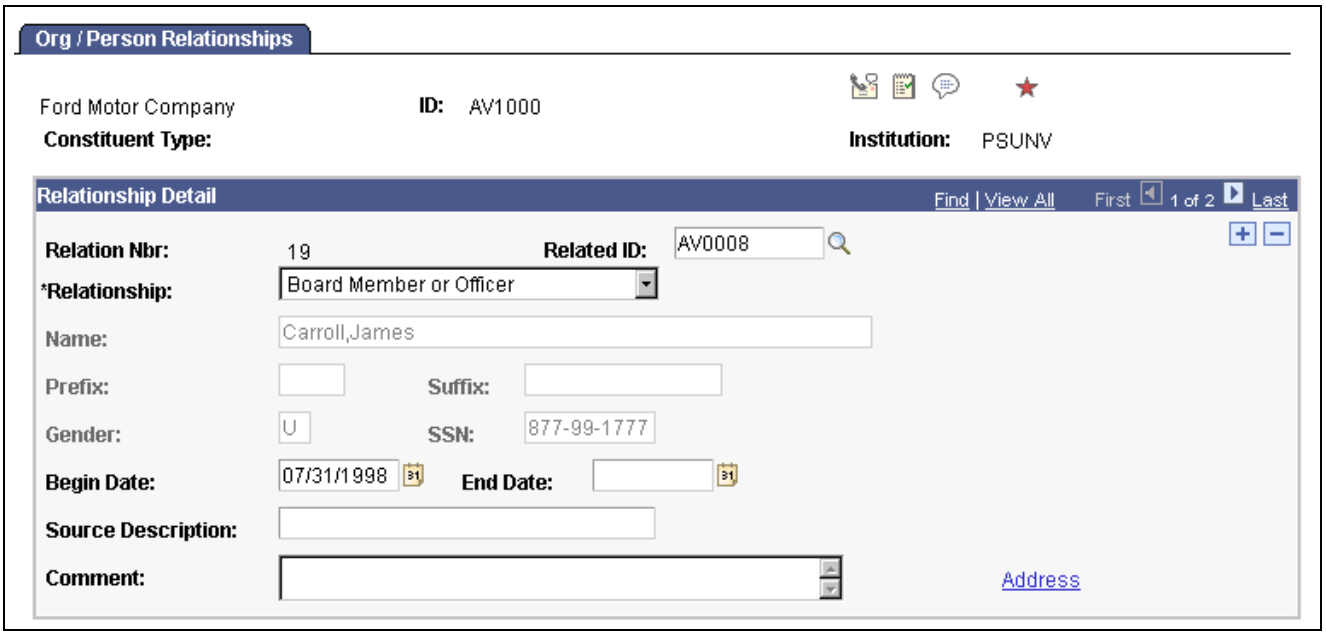
Person/Org Relationships page

Relationship Enter the relationship that the person has with the organization. For example, if you are defining a trustee/foundation relationship, the person relationship is *Trustee or Officer*.

Description Displays the name of the related organization.

Establishing an Organization to Person Relationship

Access the Org/Person Relationships page.



Org/Person Relationships page

Relationship Enter the relationship that the organization has with the person. For example, if you are defining a trustee/foundation relationship, the person's relationship to the organization is *Trustee*.

Related ID	Select the name of the related person.
Prefix	If you do not select an ID, select a name prefix. If you select an ID, the person's name prefix appears.
Suffix	If you do not select an ID, select a name suffix. If you select an ID, the person's name suffix appears.
SSN (social security number)	If you do not select an ID, enter the person's SSN. If you select an ID, the person's SSN appears.

CHAPTER 9

Managing Prospects

This chapter provides an overview of prospect management 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 35

Understanding Prospect Management

This section lists prerequisites and discusses prospect management.

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 Contributor Relations Framework," Adding Resources, page 11.

Prospect Management

To effectively manage prospects, you must quickly evaluate constituents, create comprehensive cultivation-activity plans, and constantly monitor and revise those plans. 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.

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	• Contributor Relations, Prospect Management, Prospect Resources, Mass Assignments, Mass Staff Assignments • Contributor Relations, Prospect Management, Prospect Resources, Mass Assignments, Mass Assign Staff - Workset	Assign groups of prospects to a staff member.

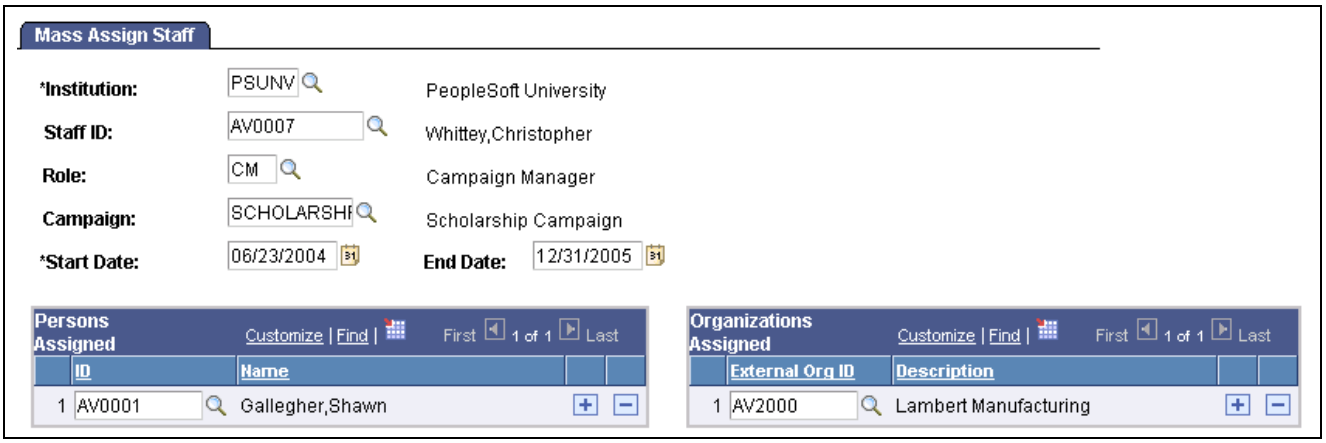
Page Name	Object Name	Navigation	Usage
Mass Assign Units	AV_MASS_UNIT, AV_MASS_UNIT_WS	• Contributor Relations, Prospect Management, Prospect Resources, Mass Assignments, Mass Unit Assignments • Contributor Relations, Prospect Management, Prospect Resources, Mass Assignments, Mass Assign Unit - Workset	Assign groups of prospects to a unit.
Mass Assign Volunteers	AV_MASS_VOL, AV_MASS_VOL_WS	• Contributor Relations, Prospect Management, Prospect Resources, Mass Assignments, Mass Volunteer Assignments • Contributor Relations, Prospect Management, Prospect Resources, Mass Assignments, Mass Assign Volunteers - WS	Assign groups of prospects to a volunteer.
Staff Assignment	AV_STAFF_ASGN, AV_STAFF_ASGN_E, AV_STAFF_ASGN_W	• Contributor Relations, Prospect Management, Prospect Resources, Assign Prospect Resources, Staff Assignment • Contributor Relations, Prospect Management, Prospect Resources, Assign Prospect Resources Org, Staff Assignment • Contributor Relations, Prospect Management, Prospect Resources, Assign Resources - Workset, Staff Assignment	Assign individual prospects to a staff member.

Page Name	Object Name	Navigation	Usage
Volunteer Assignment	AV_VOL_ASGN, AV_VOL_ASGN_E, AV_VOL_ASGN_W	• Contributor Relations, Prospect Management, Prospect Resources, Assign Prospect Resources, Volunteer Assignment • Contributor Relations, Prospect Management, Prospect Resources, Assign Prospect Resources Org, Volunteer Assignment • Contributor Relations, Prospect Management, Prospect Resources, Assign Resources - Workset, Volunteer Assignment	Assign individual prospects to a volunteer.
Unit Assignment	AV_UNIT_ASGN, AV_UNIT_ASGN_E, AV_UNIT_ASGN_W	• Contributor Relations, Prospect Management, Prospect Resources, Assign Prospect Resources, Unit Assignment • Contributor Relations, Prospect Management, Prospect Resources, Assign Prospect Resources Org, Unit Assignment • Contributor Relations, Prospect Management, Prospect Resources, Assign Resources - Workset, Unit Assignment	Assign individual prospects to a unit.
Resource Filter	AV_RSRC_ASGN_INQ	Contributor Relations, Prospect Management, Prospect Resources, 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	Contributor Relations, Prospect Management, Prospect Resources, 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.

Page Name	Object Name	Navigation	Usage
Assignment Detail	AV_ASGN_INQ_DTL_SP	• 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	• Contributor Relations, Prospect Management, Prospect Resources, Prospect Assignments • Contributor Relations, Prospect Management, Prospect Resources, Prospect Assignments - Org • Contributor Relations, Prospect Management, Prospect Resources, Prospect Assignments - Workset	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.
Role Assignments	AV_RUNCTL_ROLE	Contributor Relations, CR Reports, Role Assignments	Set parameters for the assignments to view on the Role Assignments report.

Creating Mass Assignments

Access the Mass Assign Staff, Mass Assign Units, or Mass Assign Volunteers page. Depending on which page you access, it may appear slightly different from the sample below.



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 *PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook*, "Using Self-Service Outreach," Creating and Maintaining the My Prospects Workset.

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

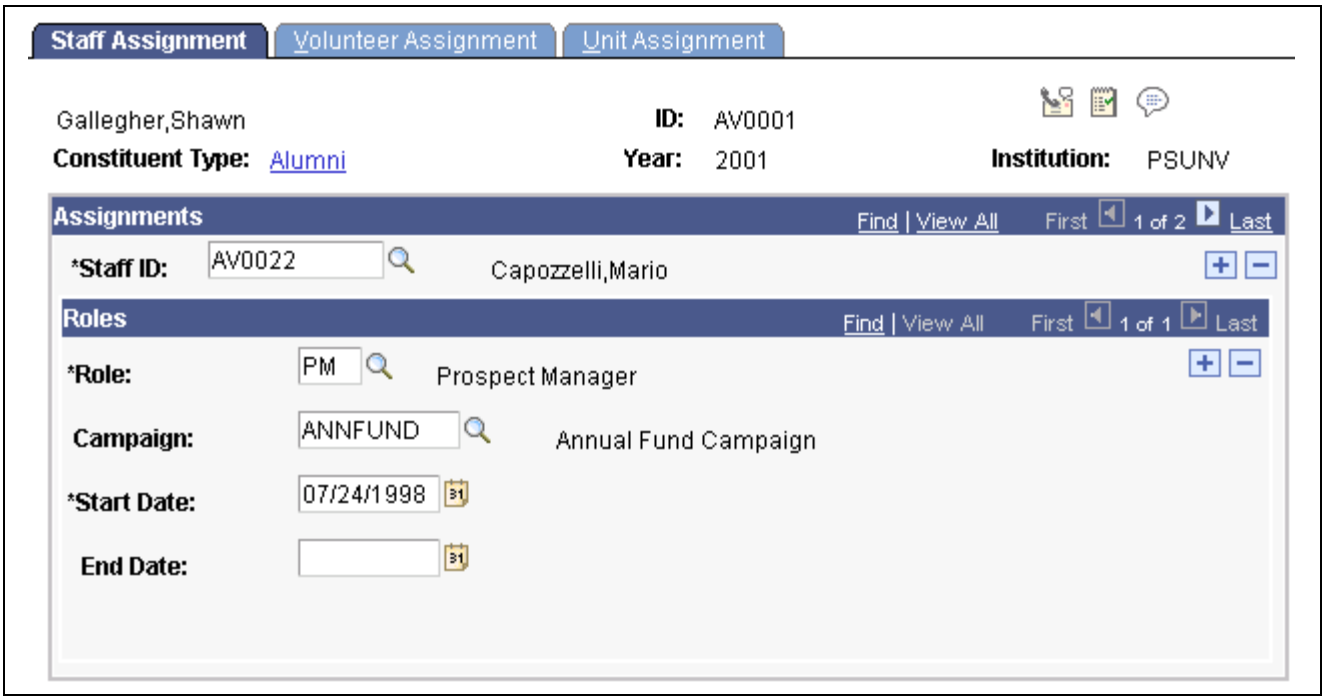
External Org ID (external organization ID) and **Description** Identify each external organization to be assigned to the resource and role that you selected. When you enter an ID, its description appears.

Workset Members

ID and **Name** When you select a workset code, the ID or name of each constituent in the workset appears.

Creating Individual Staff Assignments

Access the Staff Assignment page.



Staff Assignment page

Staff ID, Volunteer ID, and **Unit**

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.

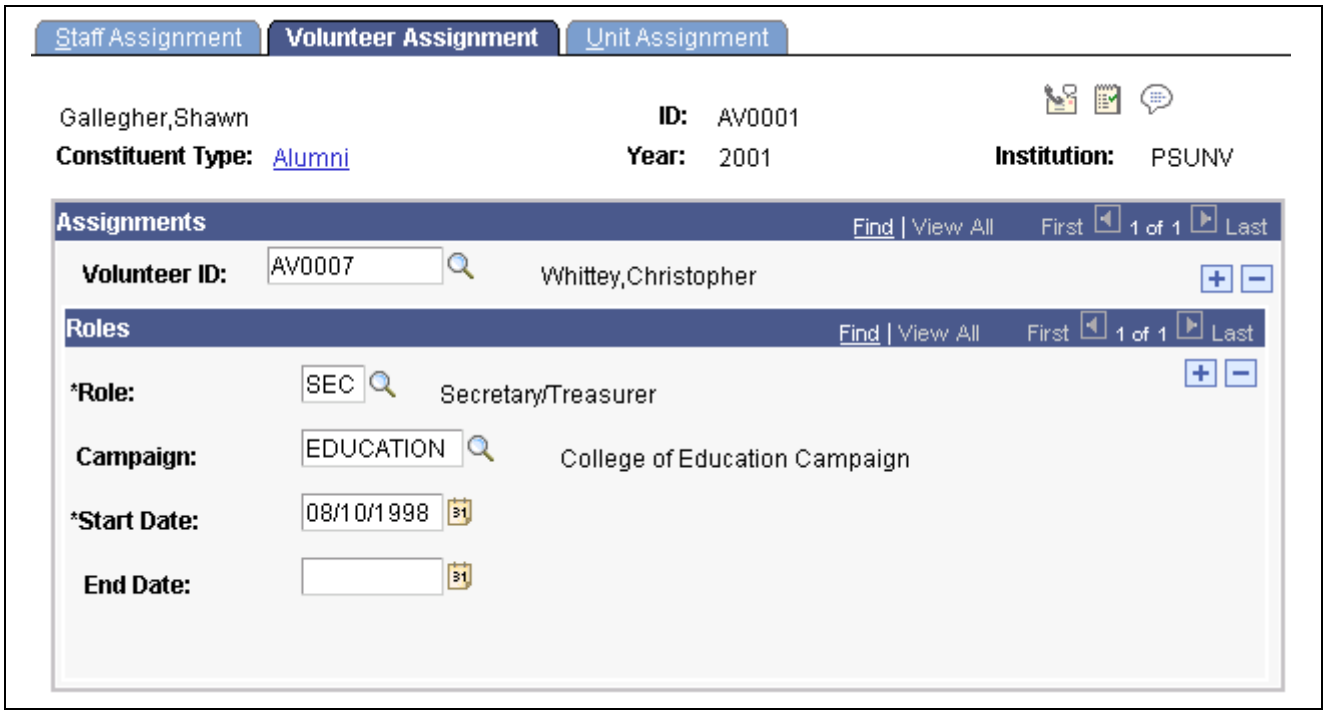
Note. If this check box is unavailable for entry, one of the following is true:

- 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.



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.

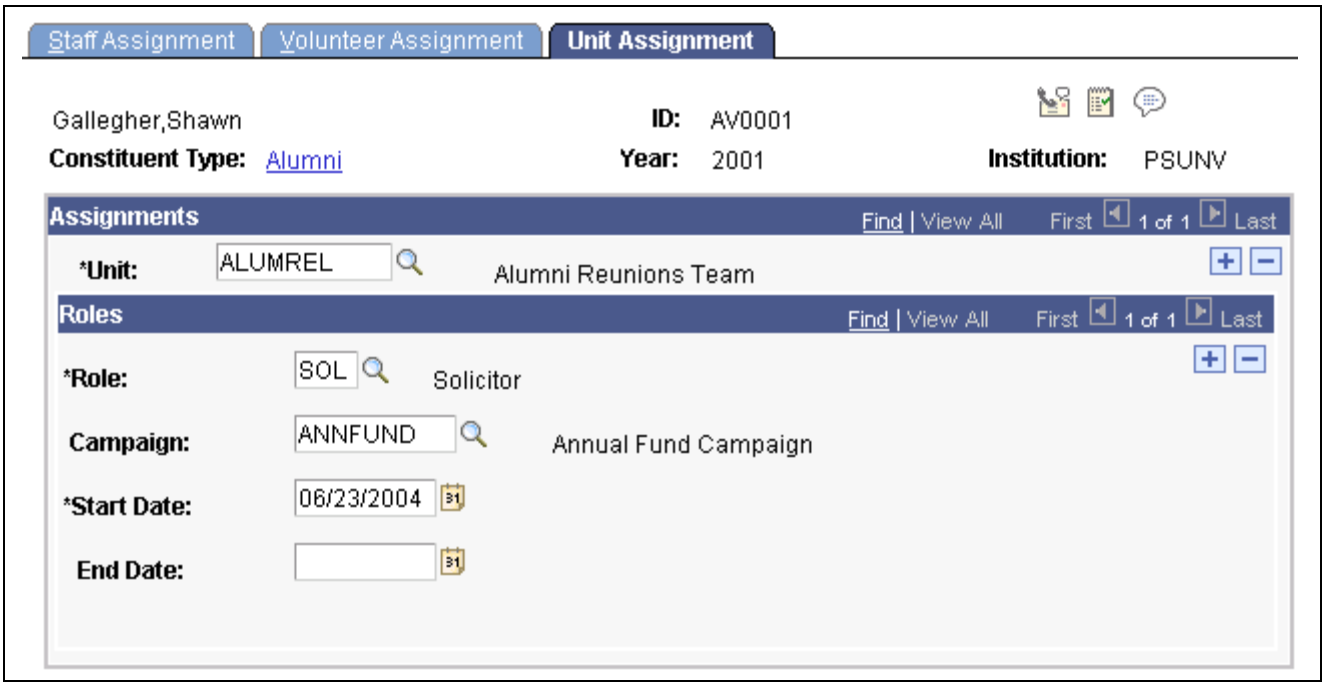
Note. You must set up an ID on the Volunteers page in order for it to appear as a valid Volunteer ID on this page.

See Also

Chapter 9, "Managing Prospects," Creating Individual Staff Assignments, page 166

Creating Individual Unit Assignments

Access the Unit Assignment page.



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.

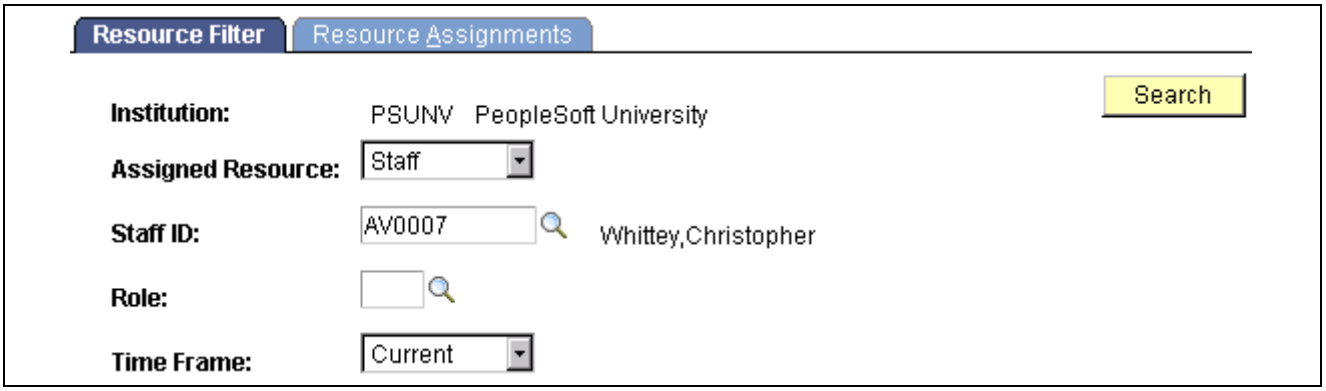
Note. You must set up a unit on the Units page in order for it to appear as a valid Unit on this page.

See Also

Chapter 9, "Managing Prospects," Creating Individual Staff Assignments, page 166

Viewing the Prospects Assigned to a Resource

Access the Resource Filter page.



Resource Filter page

After 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.

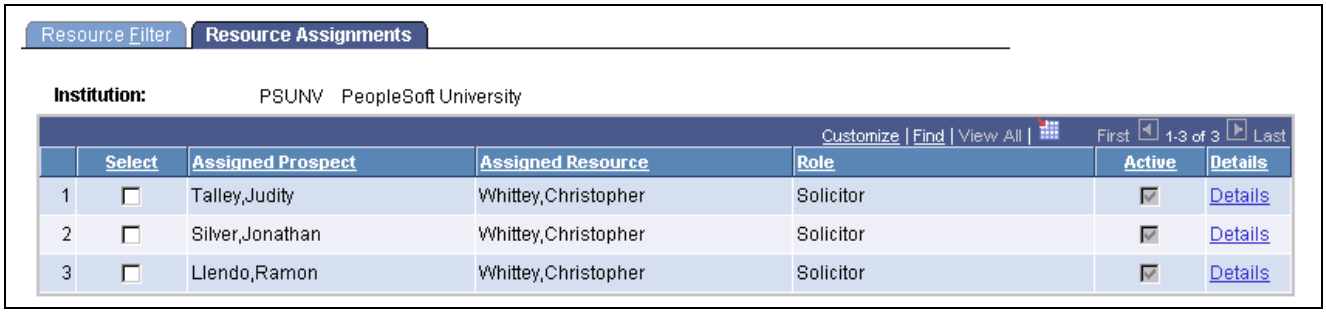
Staff ID, Volunteer ID, and **Unit ID** — Select the ID for the resource whose prospect assignments you want to view. The label for this field depends on your selection in the Assigned Resource field. This field lists all of your institution's resources of the selected type that have prospect assignments.

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 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 *Prospect Manager* or *Solicitor*.

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.

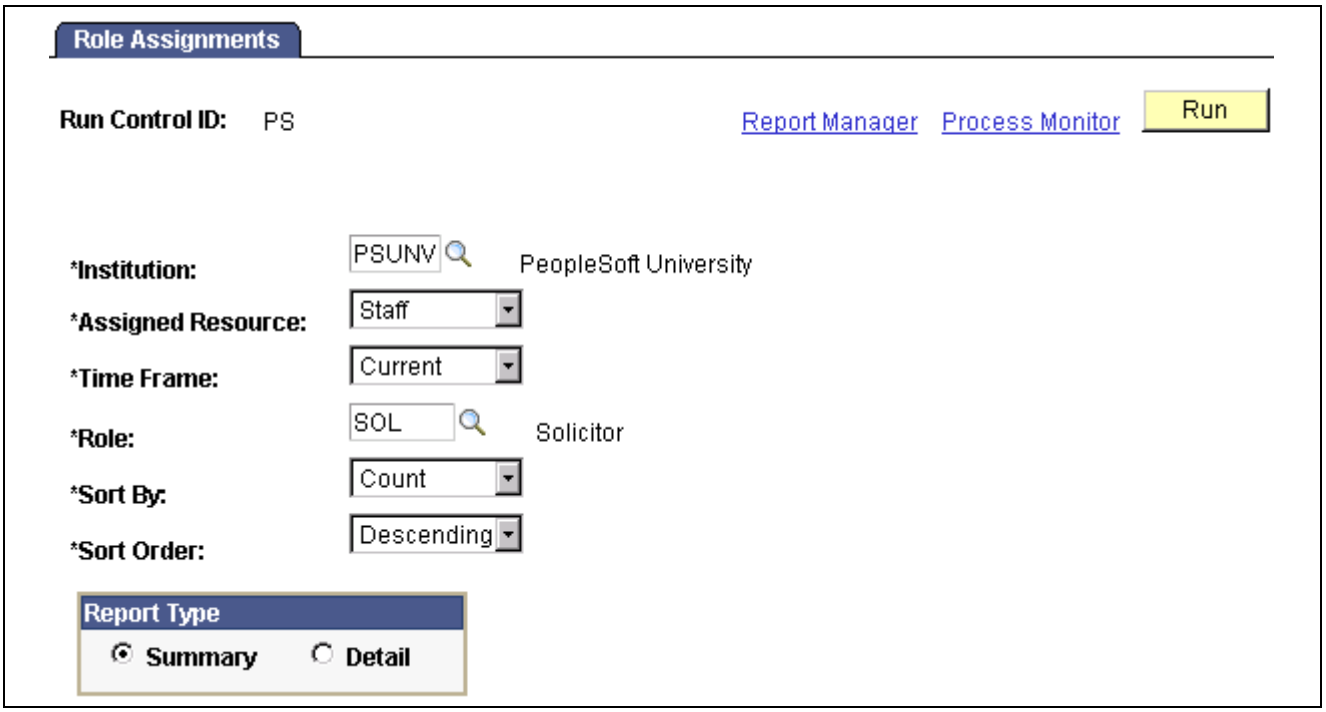
You can build a workset from this page.

See Also

Chapter 3, "General Functions Used Throughout the System," Building a Workset From a Page in the System, page 21

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 C, "PeopleSoft Contributor Relations Reports," Contributor Relations Reports: Selected Reports, page 518

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 the 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.

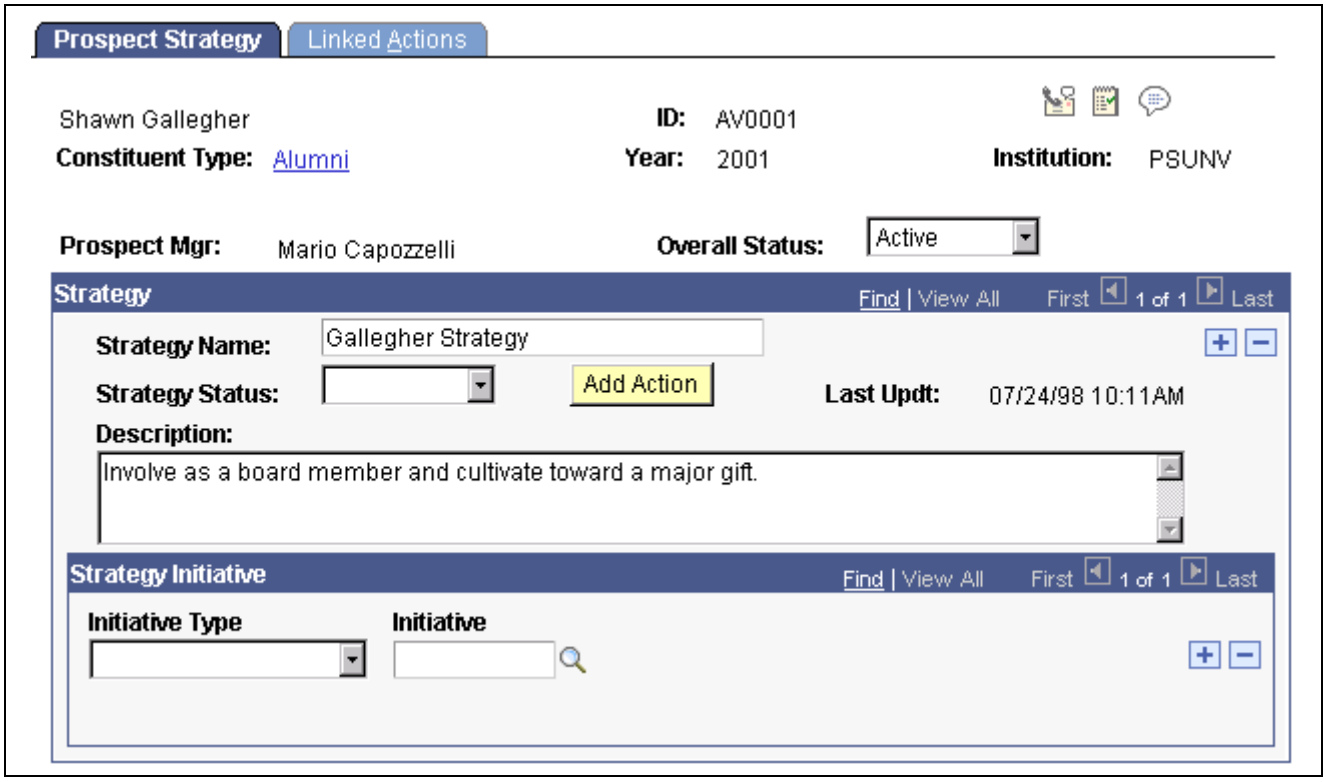
Pages Used to Create Prospect Strategies

Page Name	Object Name	Navigation	Usage
Prospect Strategy	AV_PRSP_STRATEGY, AV_PRSP_STRATEGY_E, AV_PRSP_STRATEGY_W	• Contributor Relations, Prospect Management, Stewardship Plans, Prospect Strategy, Strategy - Person, Prospect Strategy • Contributor Relations, Prospect Management, Stewardship Plans, Prospect Strategy, Strategy - Organization, Prospect Strategy • Contributor Relations, Prospect Management, Stewardship Plans, Prospect Strategy, Strategy - Workset, Prospect Strategy	Create an overall cultivation strategy for a prospect.
Linked Actions	AV_PRSP_STRAT_ACTN, AV_PRSP_STRAT_AC_E, AV_PRSP_STRAT_AC_W	• Contributor Relations, Prospect Management, Stewardship Plans, Prospect Strategy, Strategy - Person, Linked Actions • Contributor Relations, Prospect Management, Stewardship Plans, Prospect Strategy, Strategy - Organization, Linked Actions • Contributor Relations, Prospect Management, Stewardship Plans, Prospect Strategy, Strategy - Workset, Linked Actions	View the actions that are linked to a prospect's overall strategy.
Strategy Summary	AV_STRT_SMRY, AV_STRT_SMRY_E, AV_STRT_SMRY_W	• Contributor Relations, Prospect Management, Stewardship Plans, Prospect Strategy, Strategy Summary - Person • Contributor Relations, Prospect Management, Stewardship Plans, Prospect Strategy, Strategy Summary - Organization • Contributor Relations, Prospect Management, Stewardship Plans, Prospect Strategy, Strategy Summary - Workset	View a summary of the strategies for a prospect.

Page Name	Object Name	Navigation	Usage
Prospect Strategy Detail	AV_PRSP_STRAT_SP	Click the Details link on the Strategy Summary page.	View additional information about a particular prospect 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.

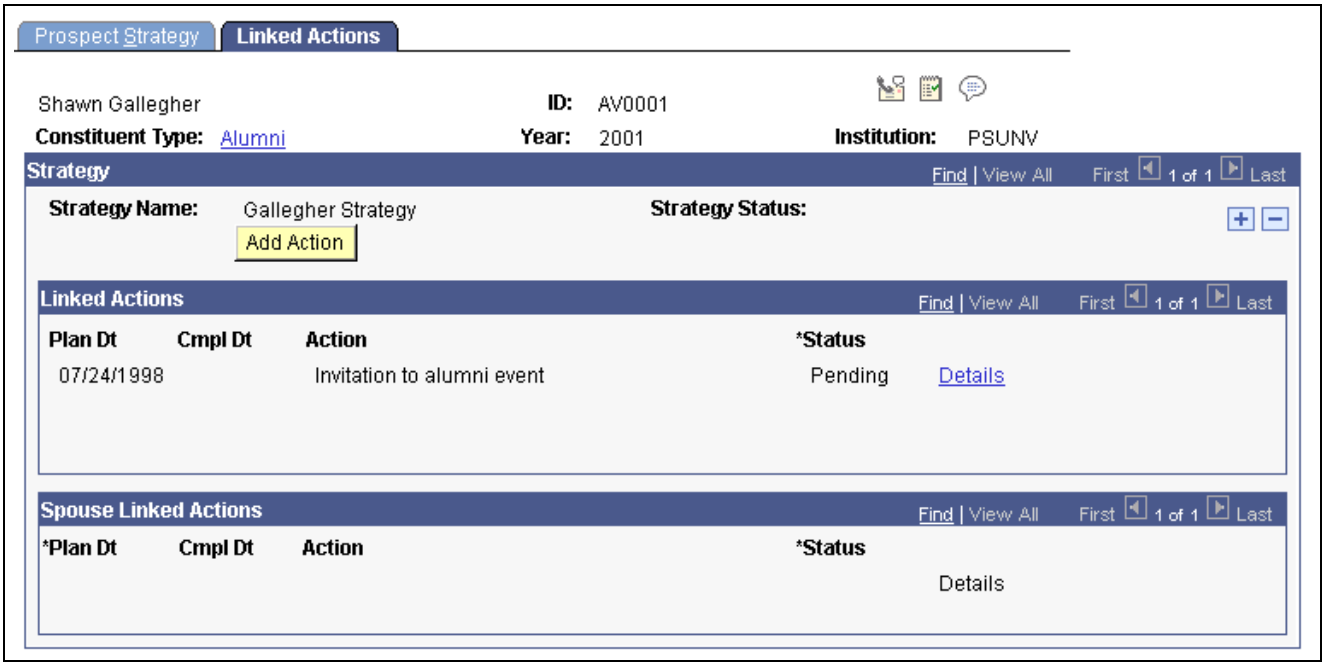
Initiative Select an initiative to relate to the prospect strategy. When you select an initiative, its descriptive name appears to the right of this field.

See Also

Chapter 9, "Managing Prospects," Creating Actions for Individual Prospects, page 193

Viewing Actions Linked to a Strategy

Access the Linked Actions page.



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 9, “Managing Prospects,” Creating Actions for Individual Prospects, page 193

Viewing a Strategy Summary

The fields on this page can also be found on the Prospect Strategy page.

See Also

Chapter 9, “Managing Prospects,” Creating a Strategy, page 174

Viewing Prospect Strategy Details

The fields on this page can also be found on the Prospect Strategy page.

See Also

Chapter 9, “Managing Prospects,” Creating a Strategy, page 174

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 Data

Page Name	Object Name	Navigation	Usage
Narrative	AV_BIO_BIT_RPT2, AV_BIO_BIT_RPT2_E, AV_BIO_BIT_RPT2_W	• Contributor Relations, CR Reports, Biographic Reports, Biographic Profile, Narrative • Contributor Relations, CR Reports, Biographic Reports, Biographic Profile - Org, Narrative • Contributor Relations, CR Reports, Biographic Reports, 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	• Contributor Relations, Prospect Management, Prospect Research, Personal Assets • Contributor Relations, Prospect Management, Prospect Research, Personal Assets - Workset	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	• You can access the Display in Other Currency page through multiple navigation paths. Below is a 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	• Contributor Relations, Prospect Management, Giving Capacity, Personal Asset Summary • Contributor Relations, Prospect Management, Giving Capacity, Personal Asset Summ - Workset	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	• Contributor Relations, Prospect Management, Prospect Research, Ratings • Contributor Relations, Prospect Management, Prospect Research, Ratings - Org • Contributor Relations, Prospect Management, Prospect Research, Ratings - Workset	Track information about the ratings that your institution uses to qualify prospects.
Ratings Summary	AV_PRSN_RATE_SMRY, AV_PRSN_RATE_SMR_E, AV_PRSN_RATE_SMR_W	• Contributor Relations, Prospect Management, Giving Capacity, Rating Summary • Contributor Relations, Prospect Management, Prospect Research, Rating Summary -Org • Contributor Relations, Prospect Management, Giving Capacity, Rating Summary - Workset	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	• Contributor Relations, Prospect Management, Giving Interests, Philanthropic Interests • Contributor Relations, Prospect Management, Giving Interests, Philanthropic Interests - Org • Contributor Relations, Prospect Management, Giving Interests, Philanthropic Interests - WS	View information about a prospect's charitable interests.
Biographic Profile	AV_BIO_BIT_RPT, AV_BIO_BIT_RPT_E, AV_BIO_BIT_RPT_W	• Contributor Relations, CR Reports, Biographic Profile • Contributor Relations, CR Reports, Biographic Profile - Org • Contributor Relations, CR Reports, Biographic Profile - Workset	Prepare and generate biographic reports. You can generate standard reports or a customized report.

Creating a Biographic Narrative

Access the Narrative page.



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.

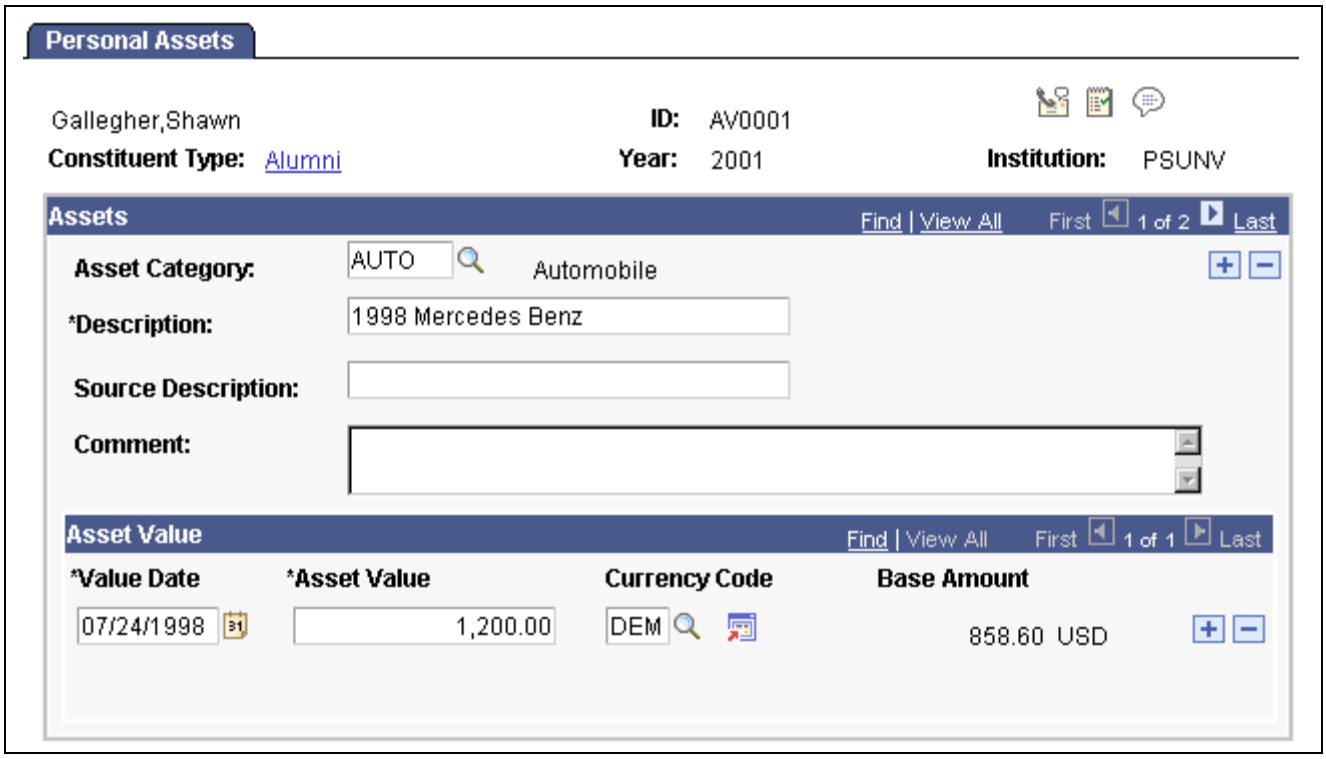
The Bio Bit and Bio Brief reports include information about the prospect based on the criteria that are set up for the report.

See Also

Chapter 9, “Managing Prospects,” Creating a Biographic Profile, page 183

Maintaining Personal Assets

Access the Personal Assets page. This page enables you to maintain specific asset information associated with a constituent.



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

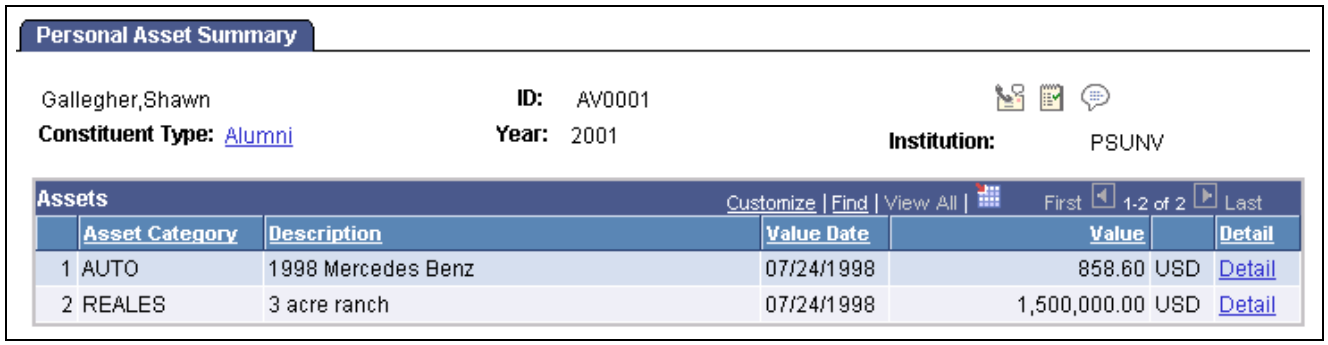
Value Date Enter the date on which the asset value was determined. The default is today's date.

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 page

The most recent monetary value for each asset that is owned by a prospect appears on this page.

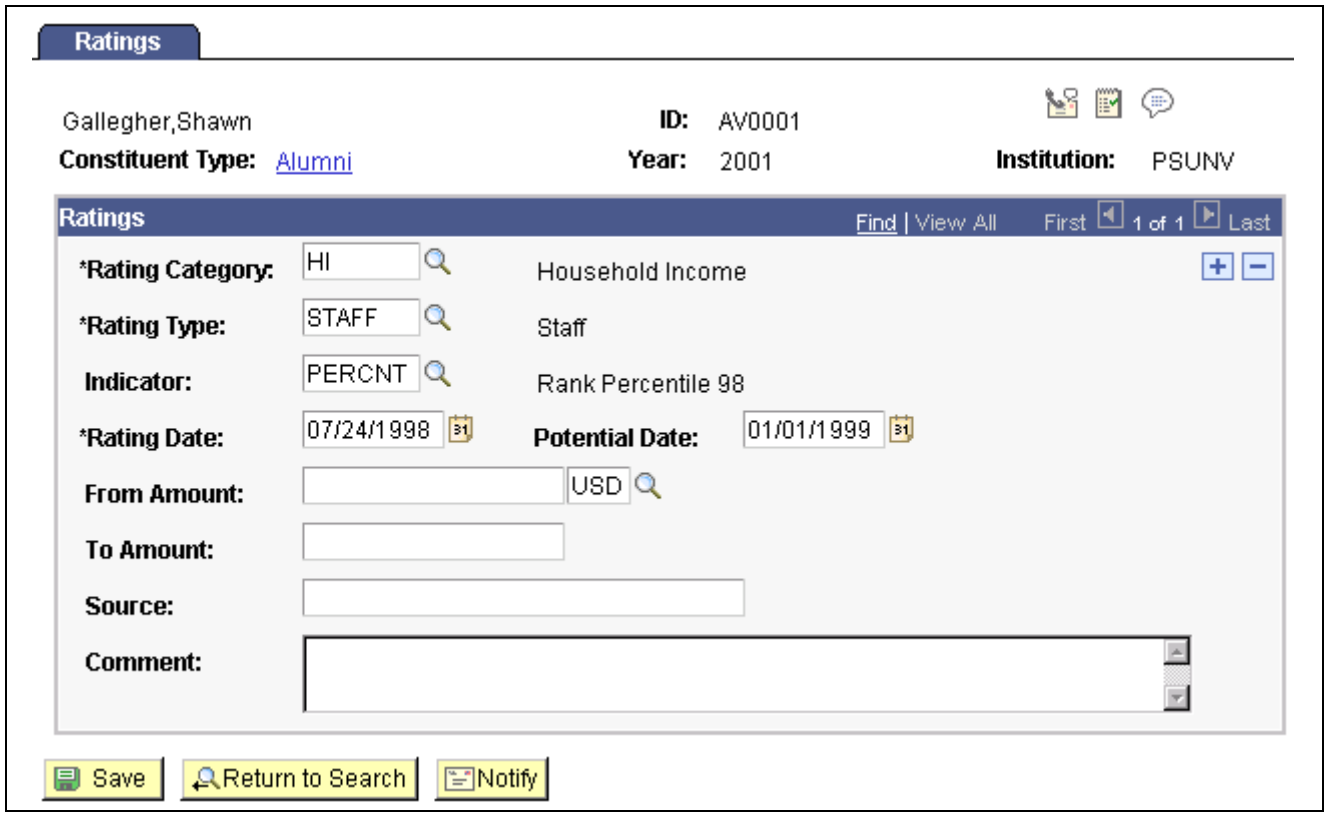
Note. The organizational records that are contained in a workset do not appear on this page when accessed from a workset menu, because personal asset information pertains only to people.

See Also

Chapter 9, "Managing Prospects," Maintaining Personal Assets, page 179

Maintaining Ratings

Access the Ratings page.



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.

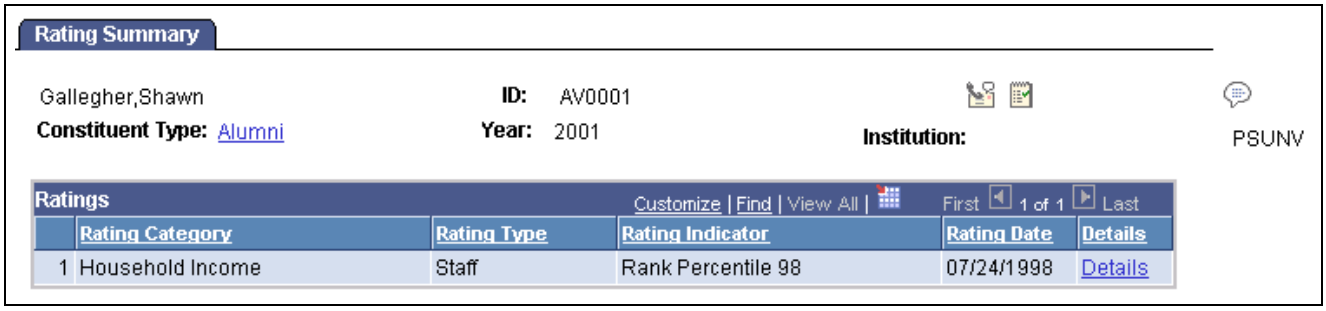
From Amount and **To Amount** Enter the minimum (from) and maximum (to) monetary ranges that specify a prospect's giving capacity or other rating that is measured in ranges of monetary amounts, like household income. A To Amount is not required.

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.

Viewing Ratings

Access the Rating Summary page.



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 9, "Managing Prospects," Maintaining Ratings, page 181

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.

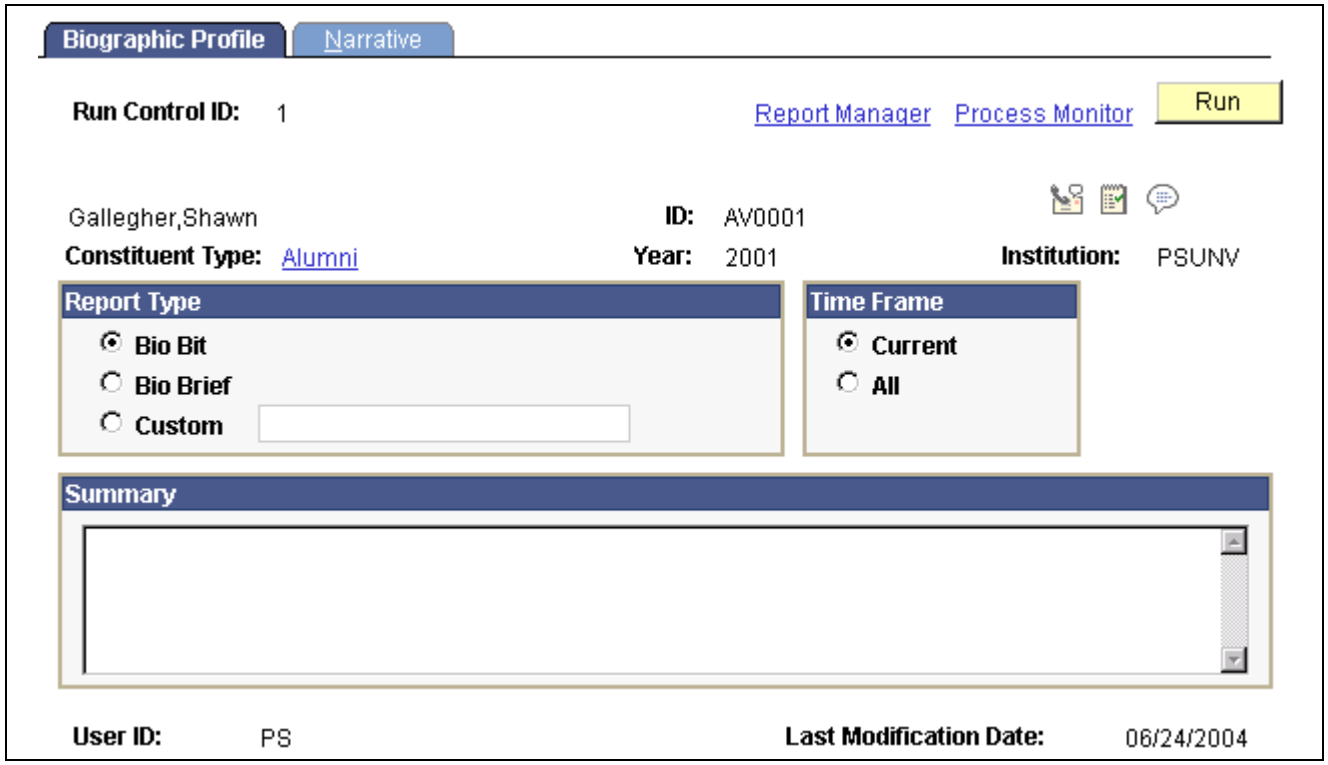
Philanthropic interests are derived from the charitable involvement and institutional giving that are recorded for a prospect. Involvement records with a category of *Charitable* and a summary of all the gifts that are made by the prospect appear on this page.

See Also

Chapter 8, “Managing Constituent Data,” Adding Involvement Records, page 153

Creating a Biographic Profile

Access the Biographic Profile page.



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 C, “PeopleSoft Contributor Relations Reports,” Contributor Relations Reports: Selected Reports, page 518

Implementing a Prospect Plan

After 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.

After 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 mass action parameters.
- Define additional mass action parameters.
- Create actions for individual prospects.
- Enter action information.
- Complete actions.
- Write a contact report.
- Maintain donor appreciation items.
- View a list of appreciation items given.
- View donor appreciation details.
- View clearances for a prospect.
- Filter prospect actions.
- View existing actions for a prospect.
- View action details.
- View contact reports.
- View contact report details.
- View to do lists.

Pages Used to Implement a Prospect Plan

Page Name	Object Name	Navigation	Usage
Clearance	AV_CLEARANCE_P, AV_CLEARANCE_E	• Contributor Relations, Prospect Management, Stewardship Plans, Clearances, Clearance • Contributor Relations, Prospect Management, Stewardship Plans, Clearances, Clearance - Organization	Approve a prospect for cultivation related to an initiative or prospect strategy.
Mass Actions 1	AV_MASS_ACTN	• Contributor Relations, Prospect Management, Stewardship Plans, Constituent Actions, Mass Actions, Mass Actions 1 • Contributor Relations, Prospect Management, Stewardship Plans, Constituent Actions, Mass Actions - Workset, Mass Actions 1	To create an action for multiple prospects at one time.
Mass Actions 2	AV_MASS_ACTN2	• Contributor Relations, Prospect Management, Stewardship Plans, Constituent Actions, Mass Actions, Mass Actions 2 • Contributor Relations, Prospect Management, Stewardship Plans, Constituent Actions, Mass Actions - Workset, Mass Actions 2	Assign constituents to a mass action.
Mass Action Completion	AV_MASS_ACTN_CMPSP	Click the Complete action link on the Mass Action 1 page.	Create a completed mass action.
Prospect Action	AV_CNST_ACTN, AV_CNST_ACTN_E	• Contributor Relations, Prospect Management, Constituent Actions, Actions - Person, Prospect Action • Contributor Relations, Prospect Management, Constituent Actions, Actions - Org, Prospect Action	Begin the process of creating an action.

Page Name	Object Name	Navigation	Usage
Action Info (action information)	AV_CNST_ACTN2, AV_CNST_ACTN2_E	• Contributor Relations, Prospect Management, Constituent Actions, Actions - Person, Action Info • Contributor Relations, Prospect Management, Constituent Actions, Actions - Org, Action Info	Enter additional information about the action that you are creating.
Action Results	AV_CNST_ACTN3, AV_CNST_ACTN3_E	• Contributor Relations, Prospect Management, Constituent Actions, Actions - Person, Action Results • Contributor Relations, Prospect Management, Constituent Actions, Actions - Org, Action Results	Complete an action and record its result.
Contact Report	AV_CNTC_RPT, AV_CNTC_RPT_E	• Contributor Relations, Prospect Management, Constituent Actions, Actions - Person, Contact Report • Contributor Relations, Prospect Management, Constituent Actions, Actions - Org, Contact Report	Enter a contact report or a report detailing the results of a particular action.
Donor Appreciation	AV_DONR_APPR, AV_DONR_APPR_E, AV_DONR_APPR_W	• Contributor Relations, Prospect Management, Donor Appreciation, Donor Appreciation • Contributor Relations, Prospect Management, Donor Appreciation, Donor Appreciation - Org • Contributor Relations, Prospect Management, Donor Appreciation, Donor Appreciation - Workset	Maintain information about the gifts that you bestow on prospects throughout the cultivation process.

Page Name	Object Name	Navigation	Usage
Donor Appreciation Summary	AV_DONR_APPR_INQ, AV_DONR_APPR_INQ_E, AV_DONR_APPR_INQ_W	• Contributor Relations, Prospect Management, Donor Appreciation, Donor Appreciation Summary • Contributor Relations, Prospect Management, Donor Appreciation, Donor Appreciation Summ - Org • Contributor Relations, Prospect Management, Donor Appreciation, Donor Appreciation Summ - WS	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	• Contributor Relations, Prospect Management, Stewardship Plans, Clearances, View Clearances • Contributor Relations, Prospect Management, Stewardship Plans, Clearances, View Clearance - Organization	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	• Contributor Relations, Prospect Management, Stewardship Plans, Constituent Actions, Action Summary - Person, Action Filter • Contributor Relations, Prospect Management, Stewardship Plans, Constituent Actions, Action Summary - Org, Action Filter • Contributor Relations, Prospect Management, Stewardship Plans, Constituent Actions, Action Summary - Workset, 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	• Contributor Relations, Prospect Management, Stewardship Plans, Constituent Actions, Action Summary - Person, Action Summary • Contributor Relations, Prospect Management, Stewardship Plans, Constituent Actions, Action Summary - Org, Action Summary • Contributor Relations, Prospect Management, Stewardship Plans, Constituent Actions, Action Summary - Workset, Action Summary	View lists of existing actions for a prospect.
Action Detail	AV_ACTN_DTL_SP, AV_ACTN_DTL2_SP, AV_ACTN_DTL3_SP	• You can access the Action Detail page through multiple navigation paths. Below is a 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.

Page Name	Object Name	Navigation	Usage
Contact Report Summary	AV_CNTC_RPT_SMRY, AV_CNTC_RPT_SMRY_E, AV_CNTC_RPT_SMRY_W	• Contributor Relations, Prospect Management, Stewardship Plans, Constituent Actions, Contact Reports - Person • Contributor Relations, Prospect Management, Stewardship Plans, Constituent Actions, Contact Reports - Organization • Contributor Relations, Prospect Management, Stewardship Plans, Constituent Actions, Contact Report Summ - Workset	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.
To Do List − Staff, To Do List − Volunteer, To Do List - Unit	AV_TODO_LIST, AV_TODO_LIST_UNT	• Contributor Relations, Prospect Management, To Do Lists, To Do List - Staff or To Do List - Volunteer or To Do List - Unit • Contributor Relations, Initiatives, Initiative Actions, 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 for Cultivation

Access the Clearance page.



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.*

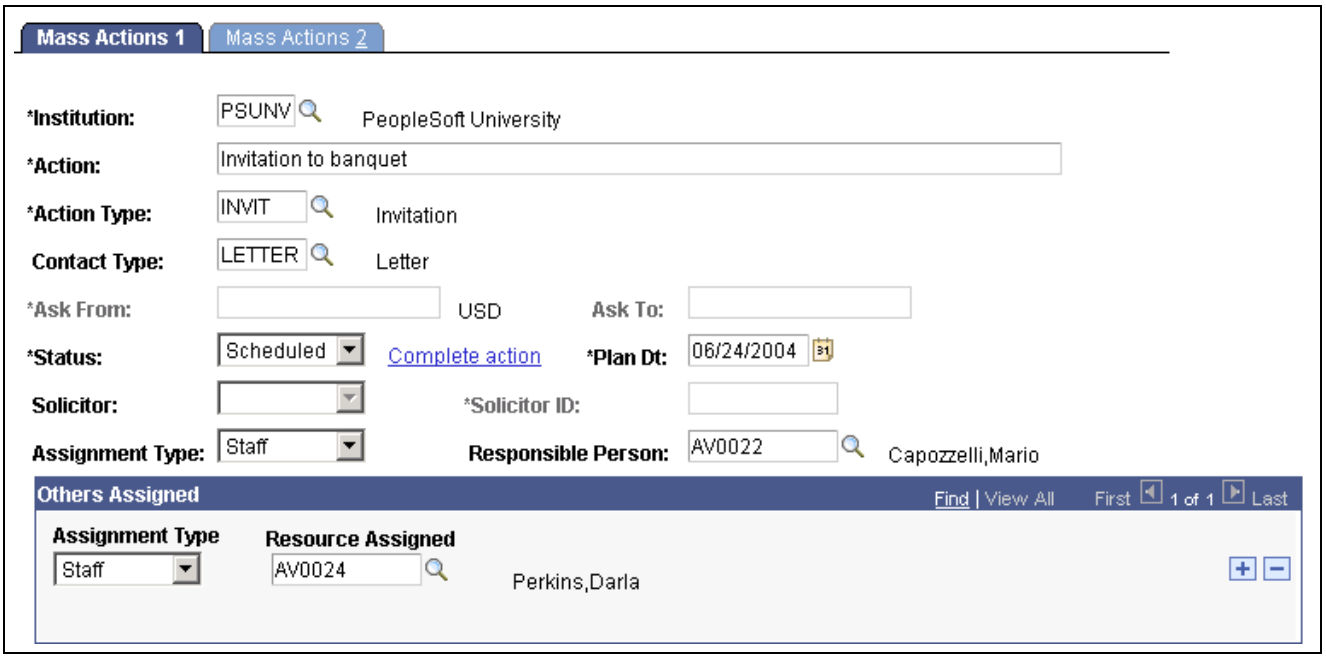
Initiative Enter the initiative for which clearance is approved. This field displays the initiatives that match the initiative type that you selected.

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 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.

Contact Type Enter the method of contact for the action.

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.

Complete action Click this link to access the Mass Action Completion page, where you can create and complete actions at one time.

Plan Dt (planned date) Enter the date when the action is planned to take place. The default is today's date.

Solicitor and **Solicitor ID** 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.

Others Assigned

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.

Completing a Mass Action

Development officers and other users can use the functionality of the Mass Actions component (AV_MASS_ACTN) to capture unscheduled actions or enter and complete an action for a group of constituents.

To create a completed mass action:

1. Set the Status to *Complete*.
2. Click the Complete action link.

   Note. If you attempt to save the page before you click the link, the system displays a reminder message.

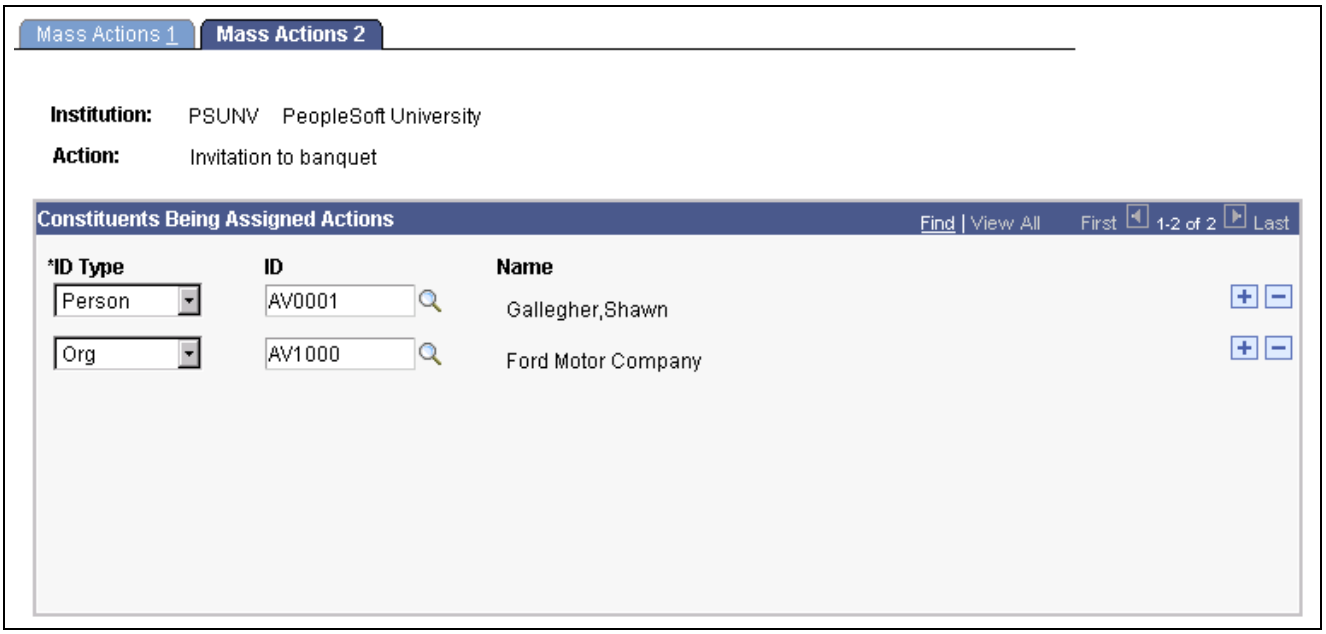
   The Mass Action Completion page appears.
3. Enter any information that you want to capture about the completed action. The result code is a required field. The Author ID defaults to the user's ID. The Complete Date and Report Date default to today's date.

   The common contact report information that you enter appears on all of the selected donors' records. If the Require Contact Report check box is selected on the CR Installation page, the system notifies you that you must enter some information in the Contact Report field.
4. Click OK.
5. Save the page.
6. On the Mass Actions 2 page, assign the action to a list of constituents or to a workset.

Completed actions that you create here appear on the To Do List page. However, since they are complete, you can only view them in the All or Historical time frames. You can add or personalize donor-specific contact report information individually through your To Do List (To Do List, Details, Edit Action) or through the constituent's action summary (in Contributor Relations or in Outreach).

Defining Additional Mass Action Parameters

Access the Mass Actions 2 page.

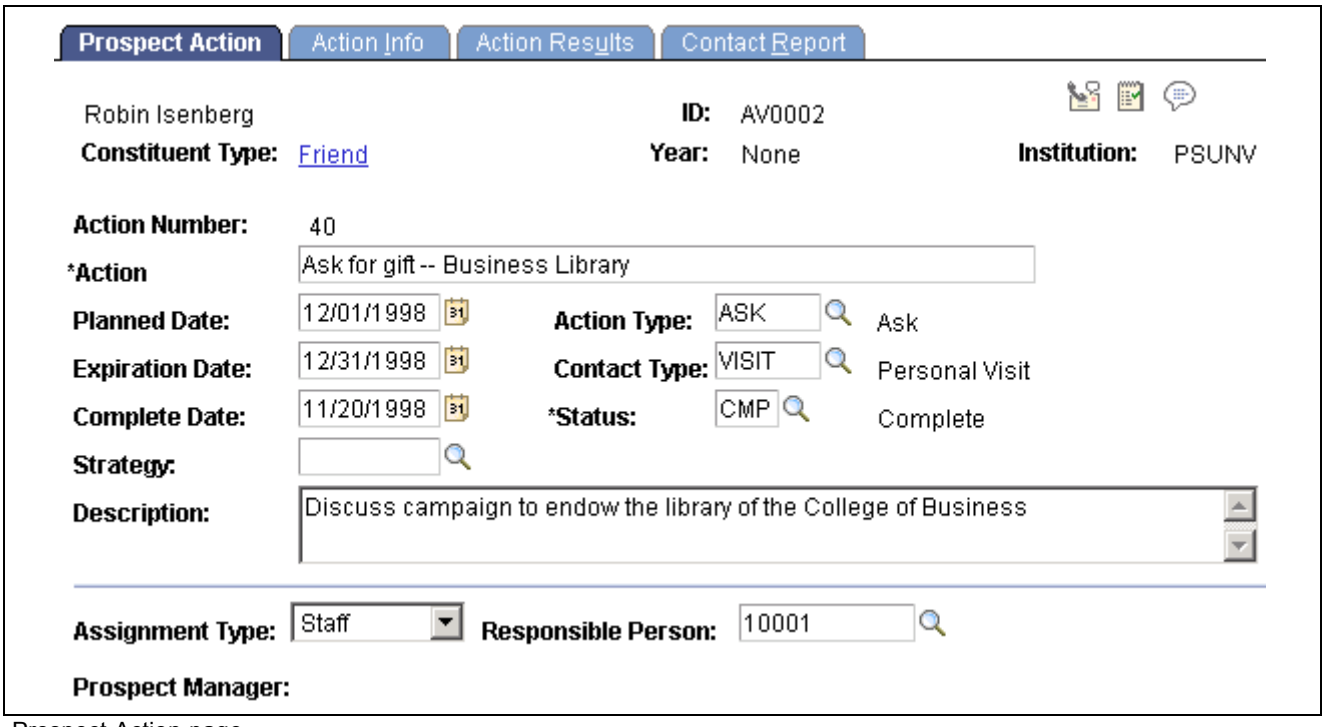


Mass Actions 2 page

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 Actions for Individual Prospects

Access the Prospect Action page.



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 If the action is complete, enter the completion date or the date on which the action occurred. Setting an action to *Complete* requires that you enter an action result code before the action can be saved.

If the Require Contact Report check box is selected on the CR Installation page, when an action is complete you are required to enter information on the Contact Report page.

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 *Ask, Dinner,* or *Phone Call,* 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 *Telephone Call, Letter, Email,* or *Personal Visit.* 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.

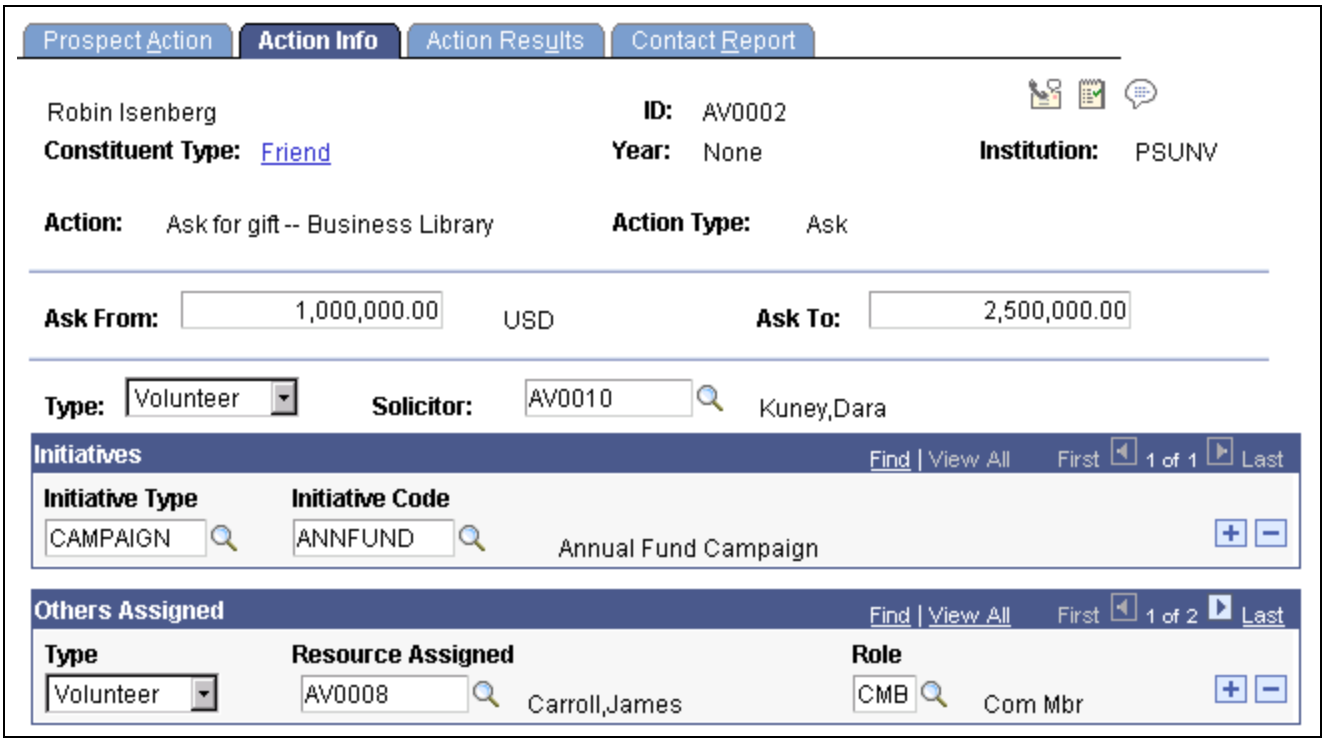
See Also

Chapter 9, "Managing Prospects," Creating Prospect Strategies, page 172

Chapter 9, "Managing Prospects," Implementing a Prospect Plan, page 184

Entering Action Information

Access the Action Info page.



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.

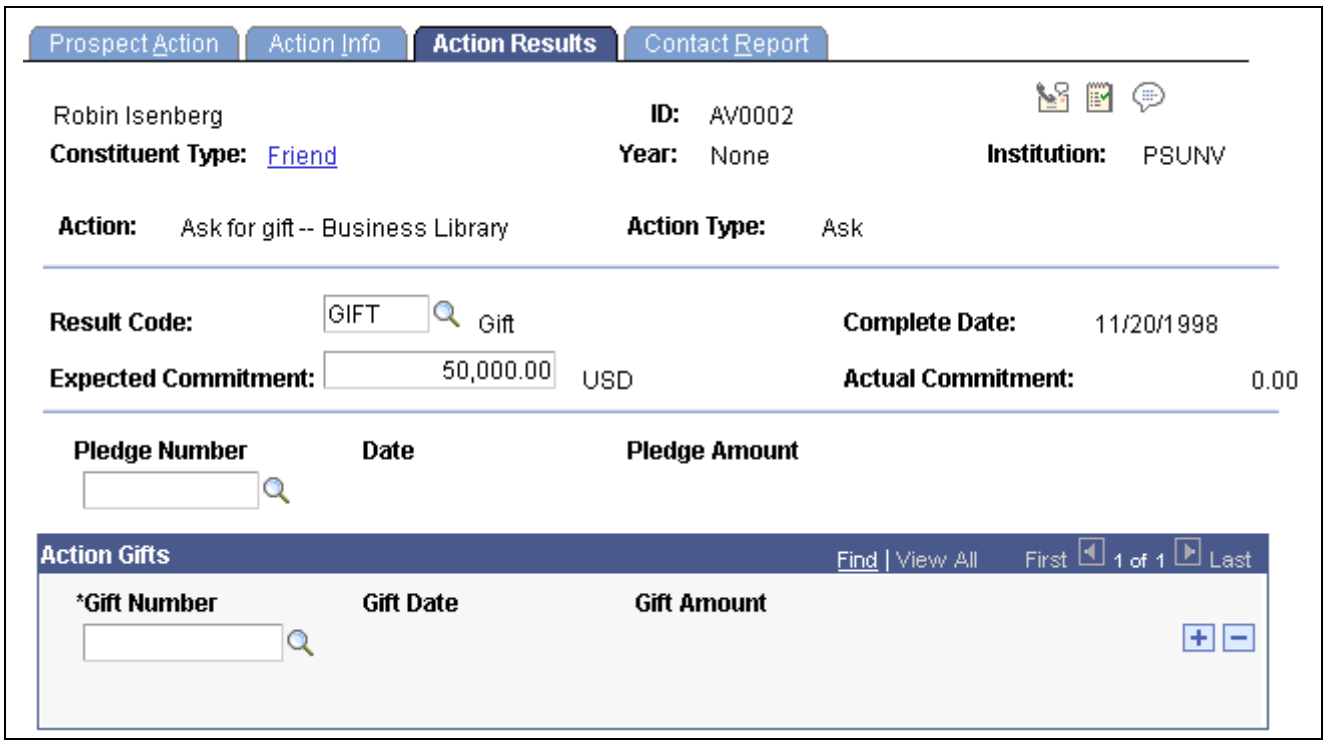
Type and **Resource Assigned** — Select the type of resource that is assigned to the action and enter the ID of the resource assigned.

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.



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 *Complete* 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 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 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.

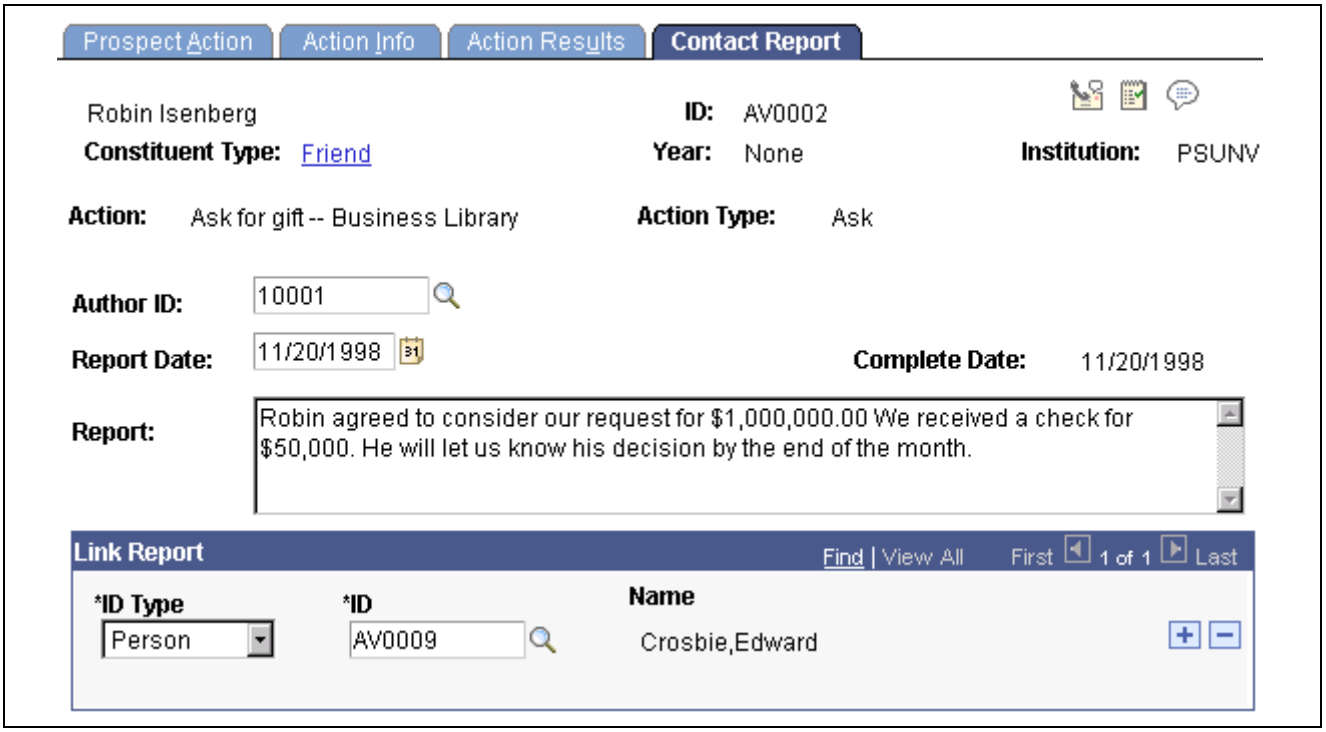
See Also

Chapter 17, "Entering Commitments," Viewing Pledge Details, page 372

Chapter 17, "Entering Commitments," Viewing Gift Details, page 351

Writing a Contact Report

Access the Contact Report page.



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.

Link Report

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. When 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.

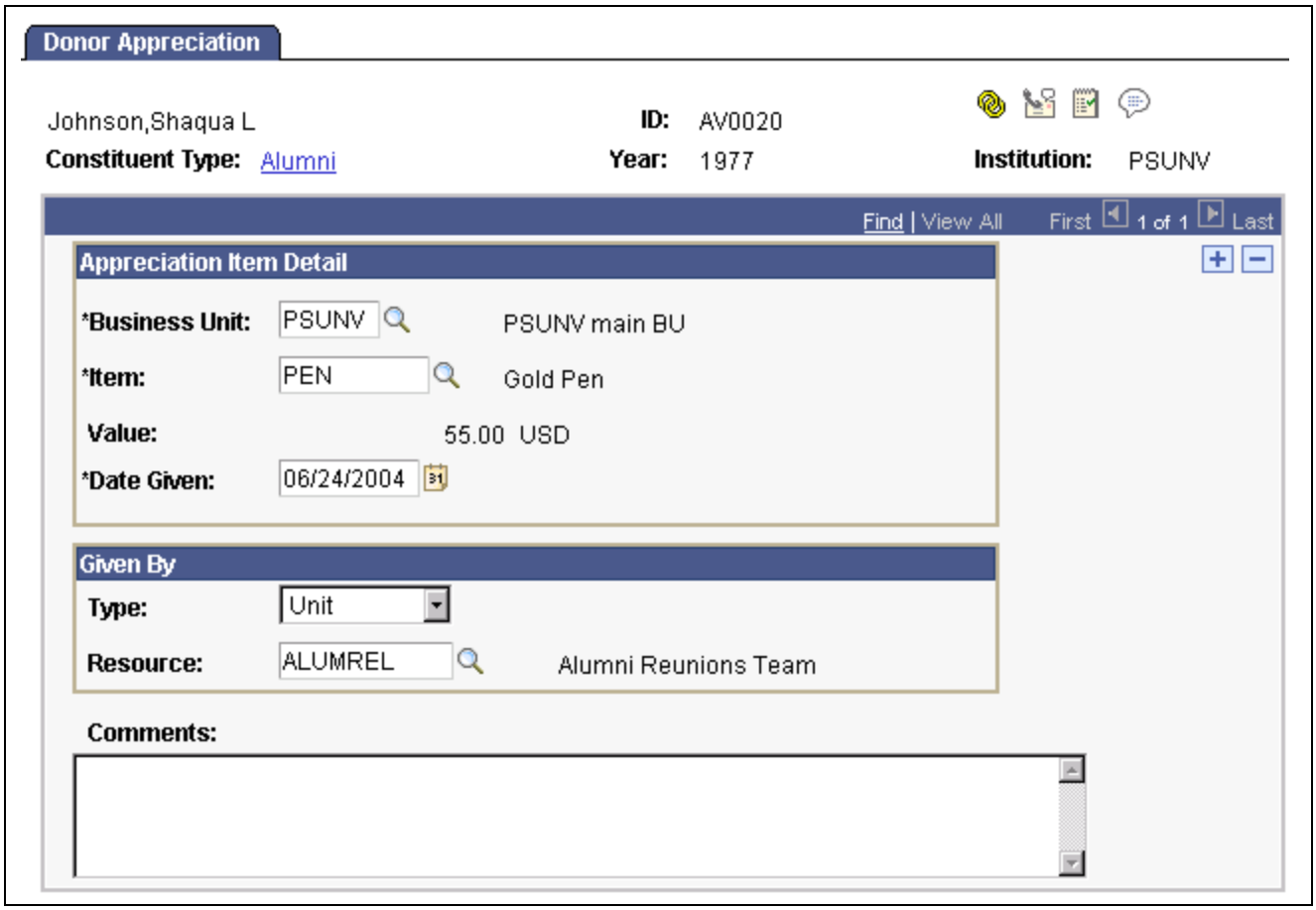
See Also

Chapter 9, "Managing Prospects," Implementing a Prospect Plan, page 184

Chapter 9, "Managing Prospects," Viewing Contact Reports, page 204

Maintaining Donor Appreciation Items

Access the Donor Appreciation page.



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.

Given By

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.

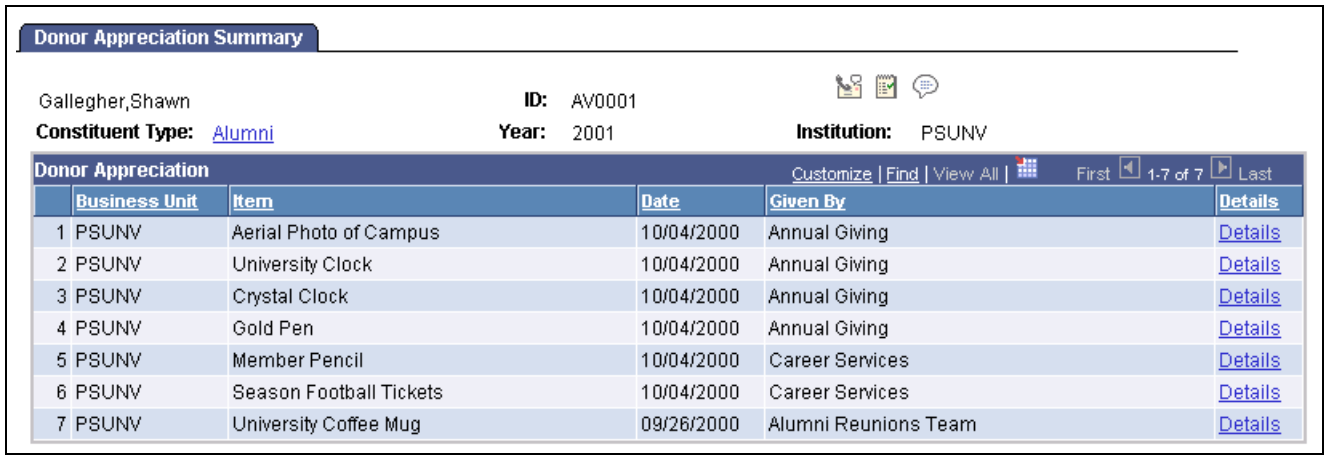
The resource type you select determines the list of choices available in the Resource field below.

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

Gallegher,Shawn ID: AV0001

Constituent Type: Alumni Year: 2001 Institution: PSUNV

Donor Appreciation — Customize | Find | 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

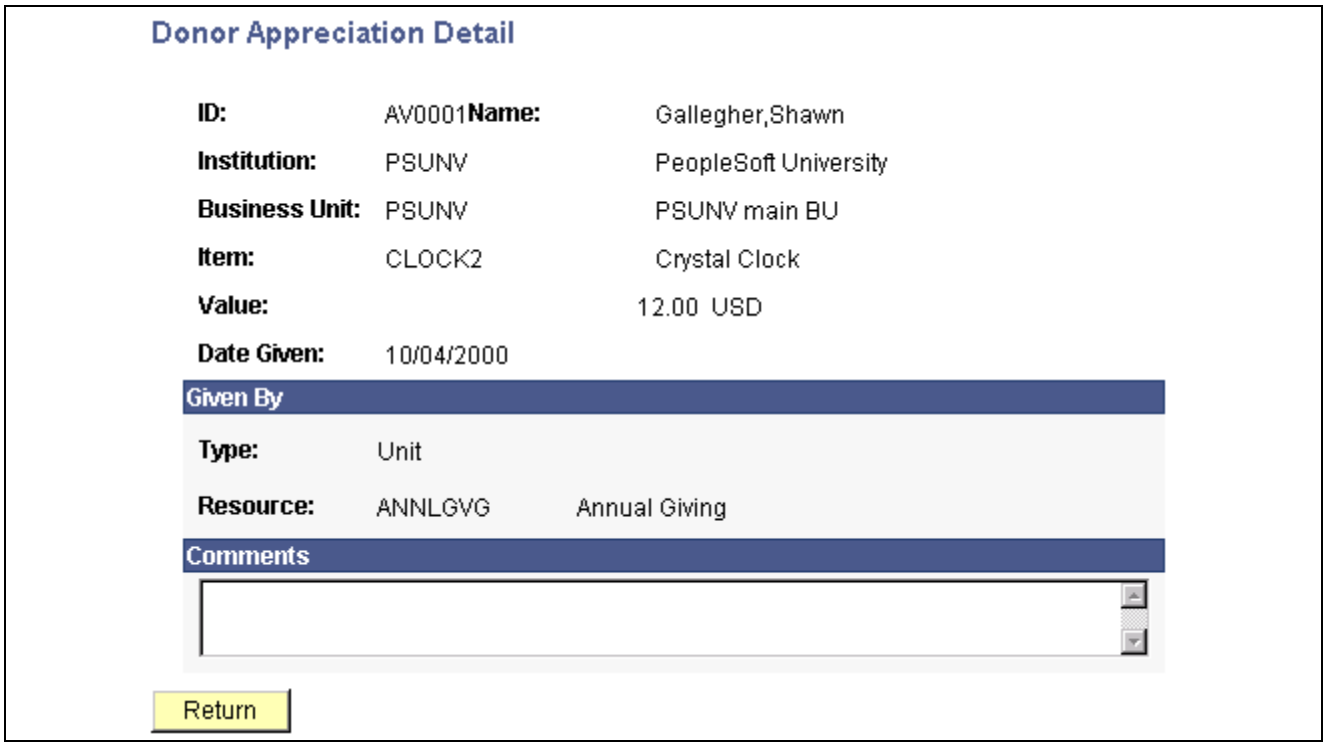
Donor Appreciation Summary page

See Also

Chapter 9, "Managing Prospects," Maintaining Donor Appreciation Items, page 198

Viewing Donor Appreciation Details

Access the Donor Appreciation Detail page.



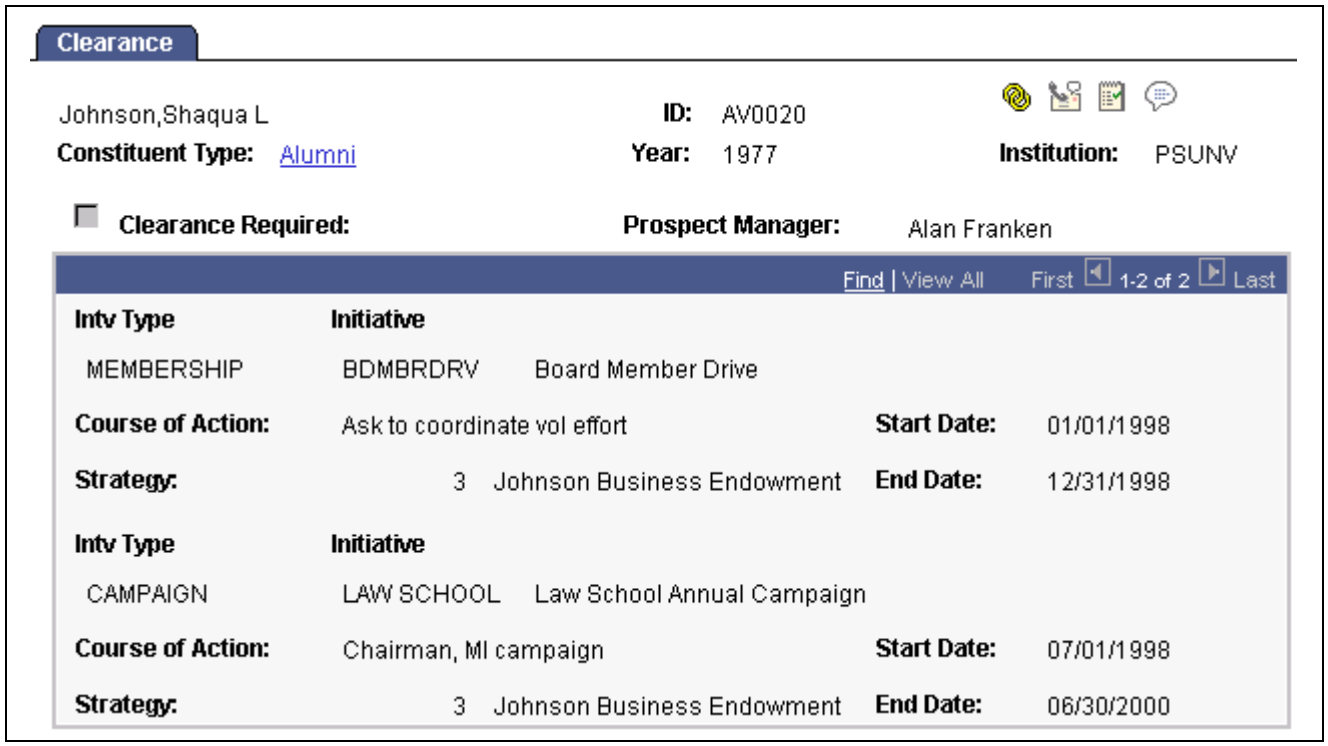
Donor Appreciation Detail page

See Also

Chapter 9, “Managing Prospects,” Maintaining Donor Appreciation Items, page 198

Viewing Clearances for a Prospect

Access the Clearance inquiry page.



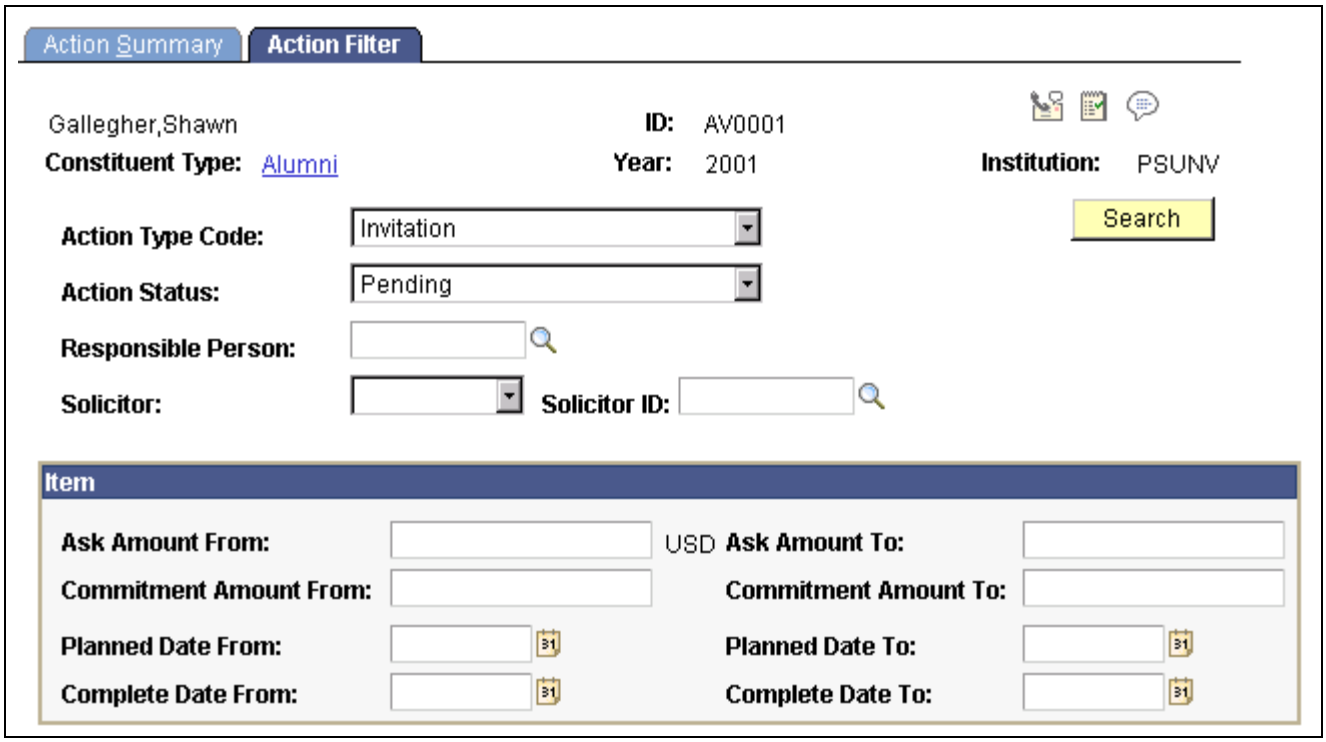
Clearance page

See Also

Chapter 9, “Managing Prospects,” Clearing a Prospect for Cultivation, page 189

Filtering Prospect Actions

Access the Action Filter page.



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 and **Solicitor ID** Select a solicitor type and enter an 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.*

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.

Item

Ask About From and **Ask Amount To** 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.*

Commitment Amount From and **Commitment Amount To**

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 From and **Planned Date To**

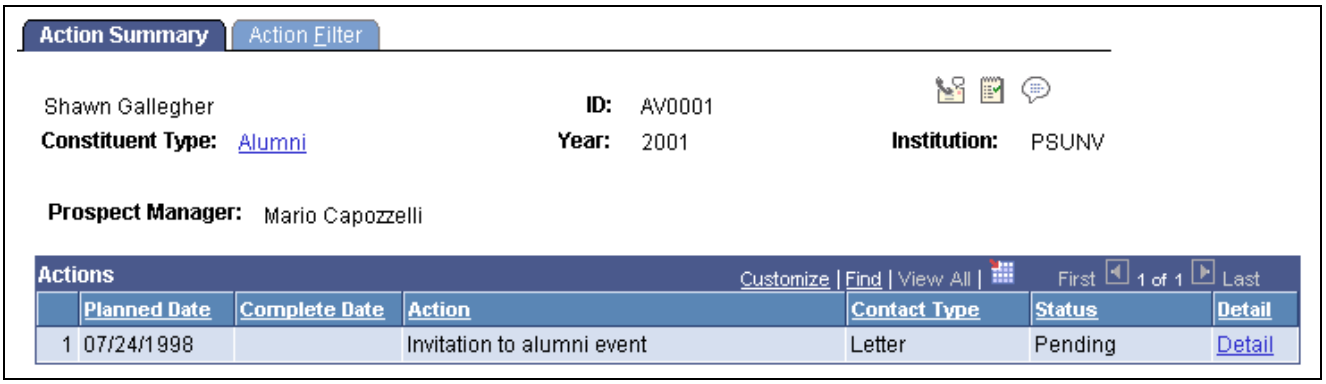
Enter a planned from and to date range. The planned date is the date on which the action is tentatively scheduled to occur.

Complete Date From and **Complete Date To**

Enter a complete from and to date range. The complete date is the date on which the action is actually complete.

Viewing Existing Actions for a Prospect

Access the Action Summary page.



Action Summary page

The fields on this page also appear on the Prospect Action page.

Contact Report

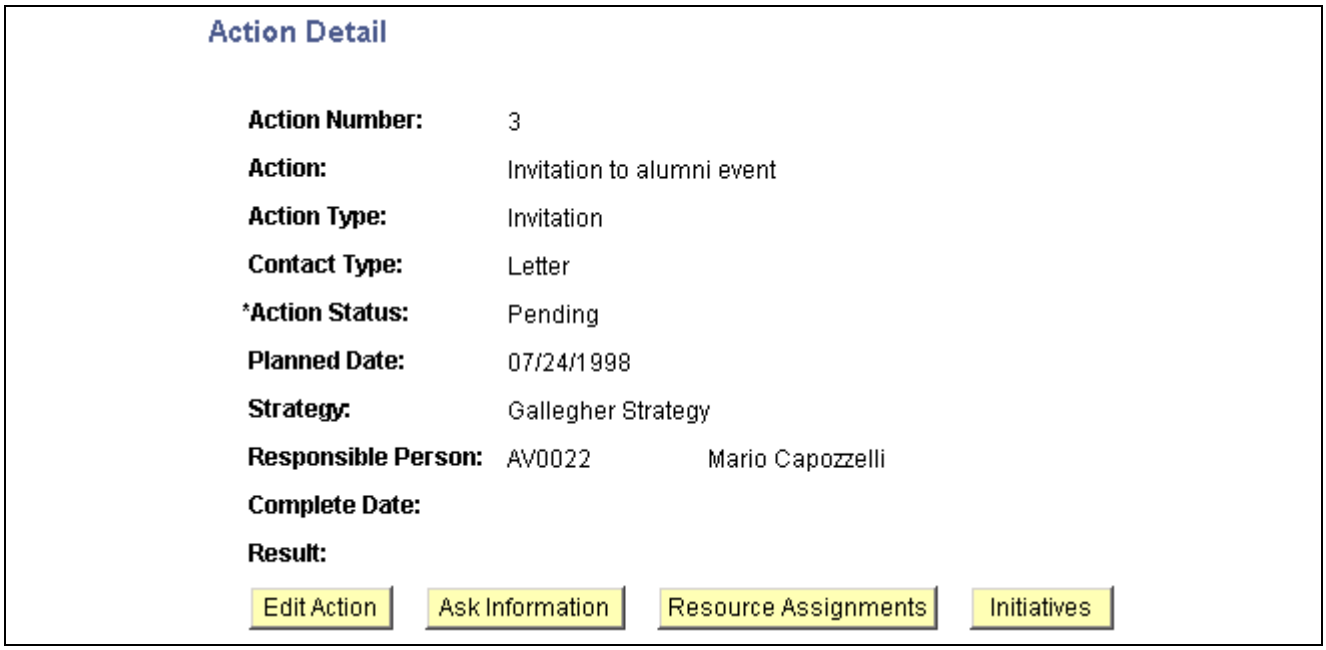
Click this link to view contact report information that is associated with this action on the Contact Report Detail page.

See Also

Chapter 9, "Managing Prospects," Creating Actions for Individual Prospects, page 193

Viewing Action Details

Access the Action Detail page.



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 *Ask* 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.

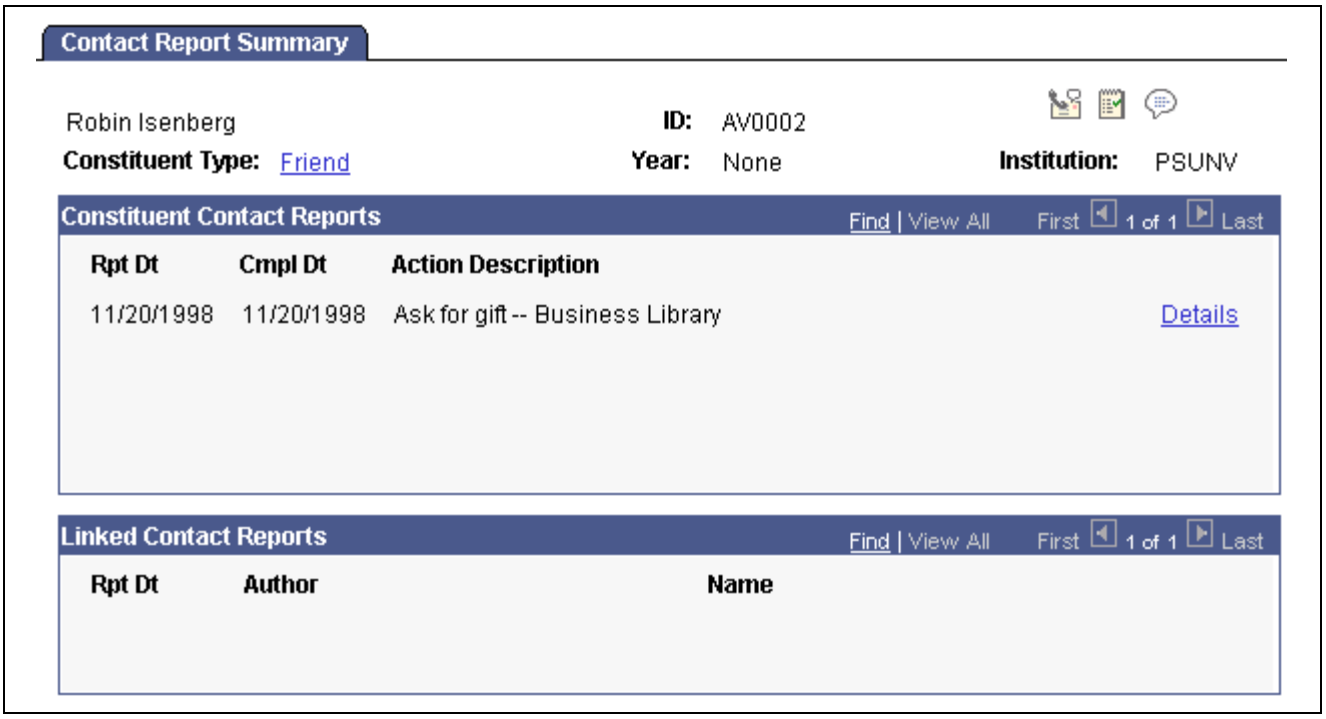
See Also

Chapter 9, "Managing Prospects," Entering Action Information, page 194

Chapter 9, "Managing Prospects," Completing Actions, page 196

Viewing Contact Reports

Access the Contact Report Summary page.



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 9, “Managing Prospects,” Writing a Contact Report, page 197

Viewing Contact Report Details

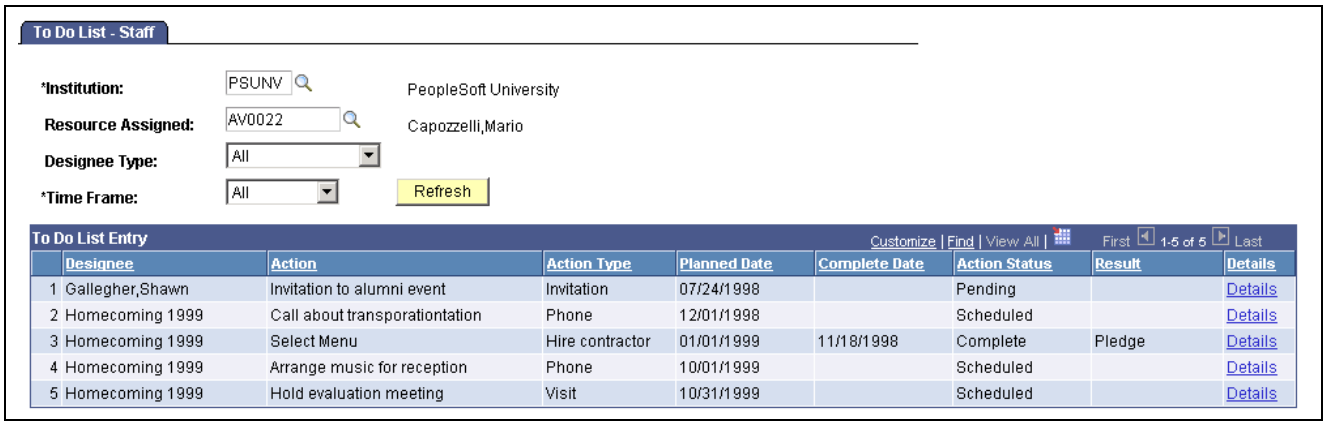
The Link Report group box displays the ID and name of other prospects to whom this contact report pertains, and who are linked to the contact report for the original prospect.

See Also

Chapter 9, “Managing Prospects,” Writing a Contact Report, page 197

Viewing To Do Lists

Access the To Do List - Staff page.



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 10

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 35

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. 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 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.

	If you have already selected a designation, then change the business unit, and your selections are backed out.
Designation	Select the designation to assign. Designations are funds at your institution to which donations can be allocated.
Type	Select a type for the intended distribution. Values are: *Interim:* The designation is a temporary holding site for the planned gift. *Ultimate:* The gift remains in the designation that you select. Values for this field are delivered with the system as translate values. You can modify these translate values.
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	Select the value that describes the contact's connection to the planned gift. Values for this field are delivered with the system as translate values. You can modify these translate values.
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 *Prospect Manager, Solicitor,* and *Campaign Manager*.
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 *Asset, Liability,* and *Reserve.*

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:

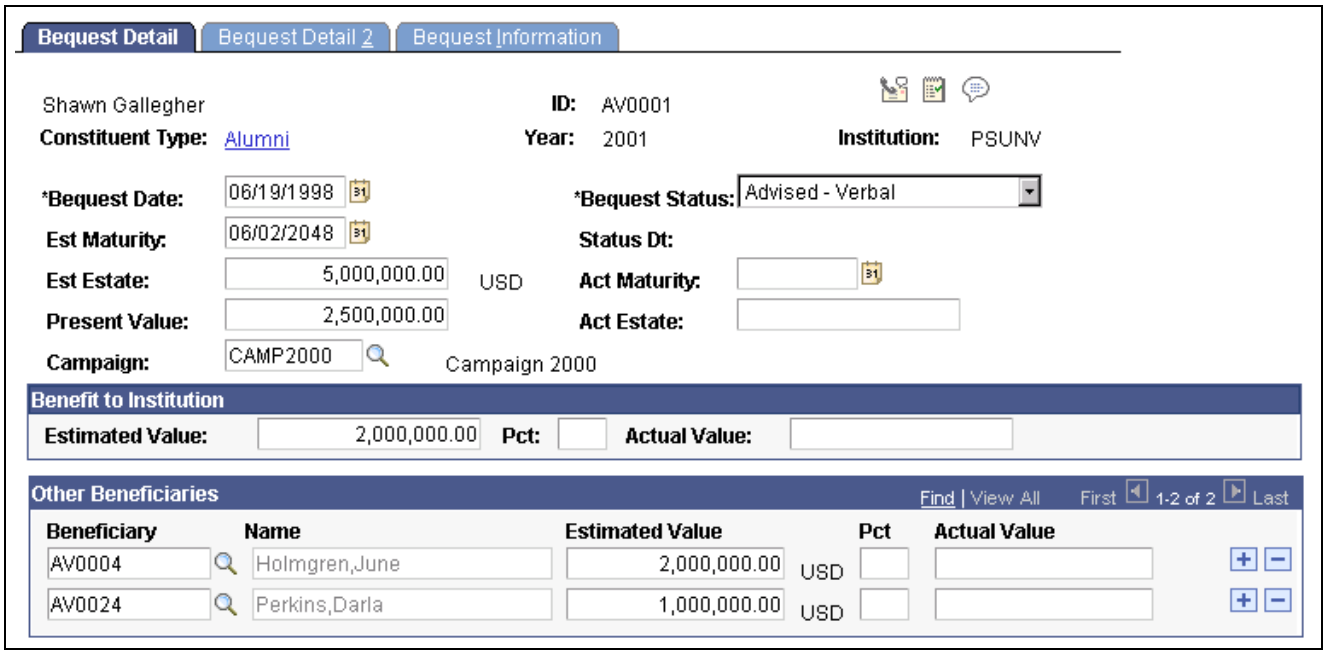
- Enter bequest details.
- Enter additional information about that bequest.
- Enter information about how the bequest will be handled by your institution.

Pages Used to Track Bequests

Page Name	Object Name	Navigation	Usage
Bequest Detail	AV_BEQUEST_DTL	Contributor Relations, Prospect Management, Planned Giving, Bequests, Bequest Detail	Enter information about a constituent's bequest to your institution.
Bequest Detail 2	AV_BEQUEST_DTL2	Contributor Relations, Prospect Management, Planned Giving, Bequests, Bequest Detail 2	Enter additional information about a constituent's bequest to your institution.
Bequest Information	AV_BEQUEST_INFO	Contributor Relations, Prospect Management, Planned Giving, 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 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 (estimated 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 (actual 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.

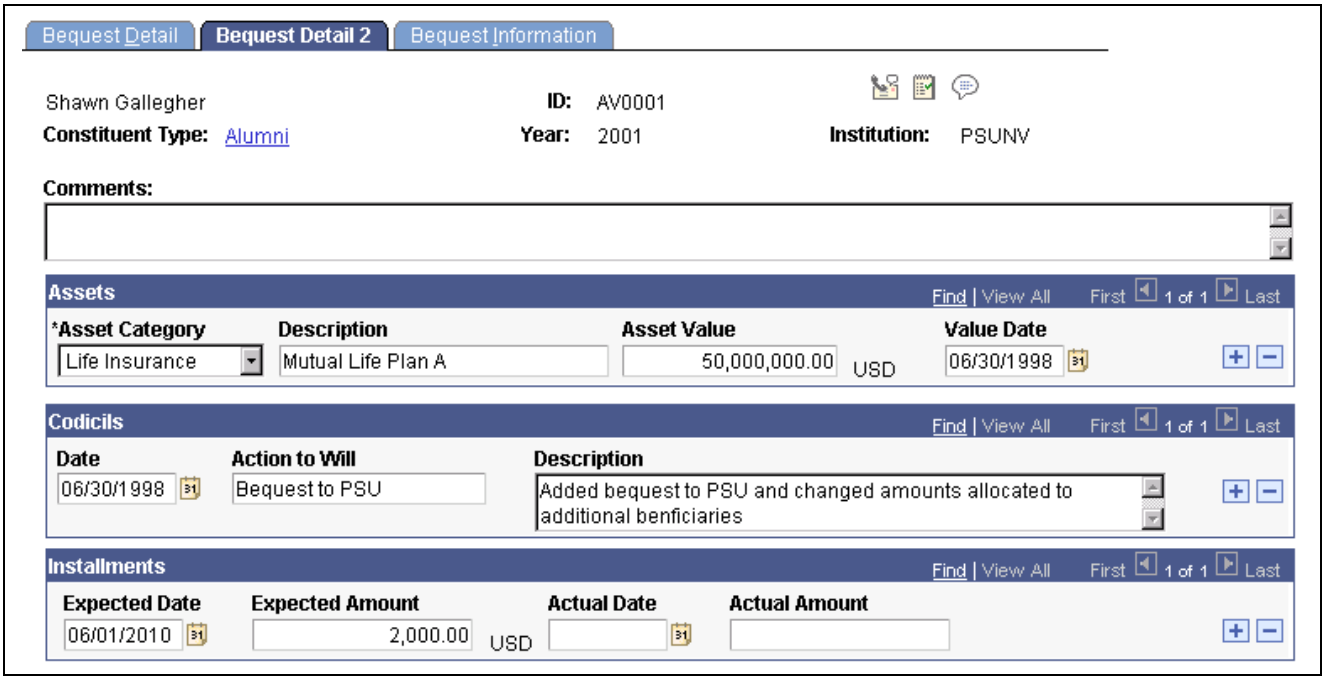
Other Beneficiaries

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

Assets

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.

Codicils

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.

Installments

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** When an installment is paid, enter the date and amount received.

Defining Institutional Bequest Information

Access the Bequest Information page.



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:

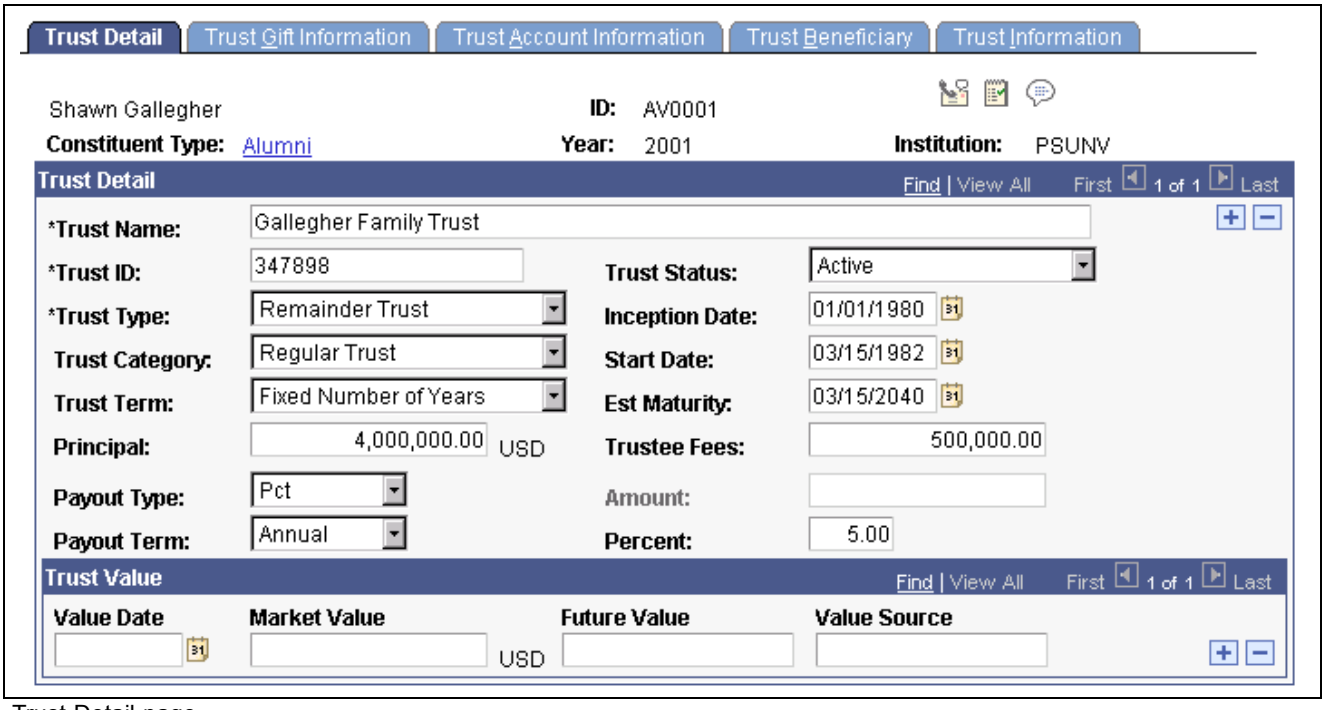
- Define trust details.
- Define trust gift information.
- Define trust account information.
- Define trust beneficiaries.
- Enter information about how the trust will be handled by your institution.

Pages Used to Track Trusts

Page Name	Object Name	Navigation	Usage
Trust Detail	AV_TRUST_DTL	Contributor Relations, Prospect Management, Planned Giving, Trusts, Trust Detail	Enter information about a donor's trust that benefits your institution.
Trust Gift Information	AV_TRUST_GINFO	Contributor Relations, Prospect Management, Planned Giving, Trusts, Trust Gift Information	Record information about additional gifts made to an established trust.
Trust Account Information	AV_TRUST_AINFO	Contributor Relations, Prospect Management, Planned Giving, Trusts, Trust Account Information	Track accounts that are associated with a trust that benefits your institution.
Trust Beneficiary	AV_TRUST_BFCY	Contributor Relations, Prospect Management, Planned Giving, 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	Contributor Relations, Prospect Management, Planned Giving, 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 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 *Fixed Amount,* enter the amount of each payout in this field.

Payout Term Select the frequency with which payouts are made. Values are *Annual Bi-Annual, Bi-Month, Monthly,* and *Quarterly.*

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 *Percent,* enter the percentage of the trust that is given in each payout.

Trust Value

Value Date Select the date the valuation is set.

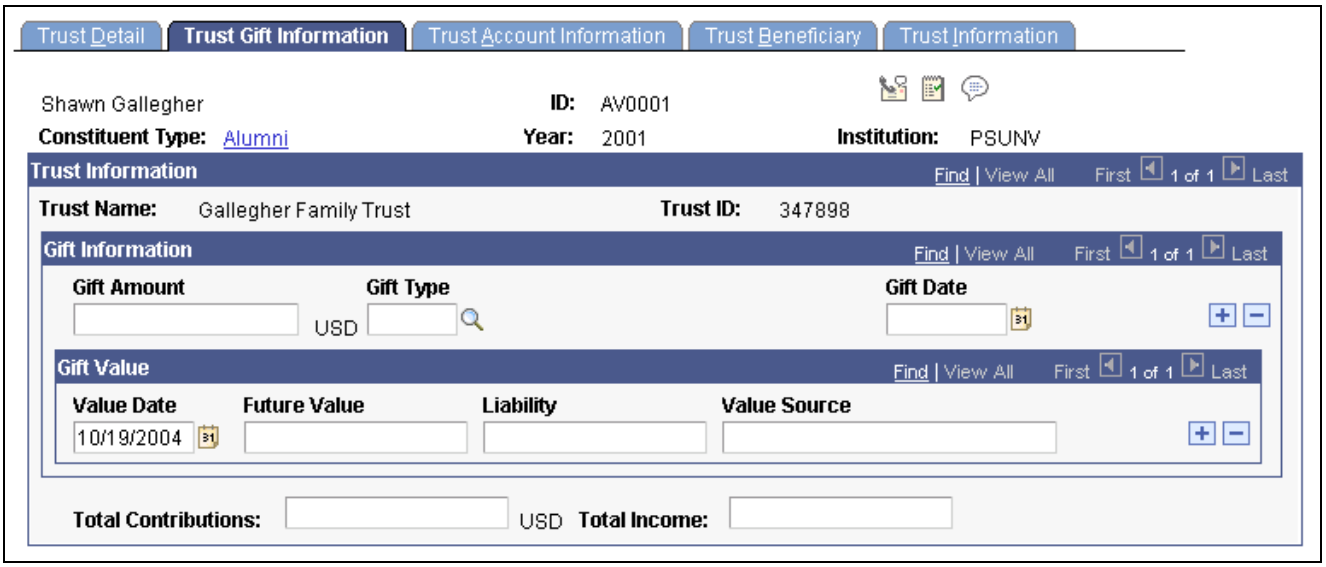
Market Value Enter the monetary value of the trust according to today's market.

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 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.

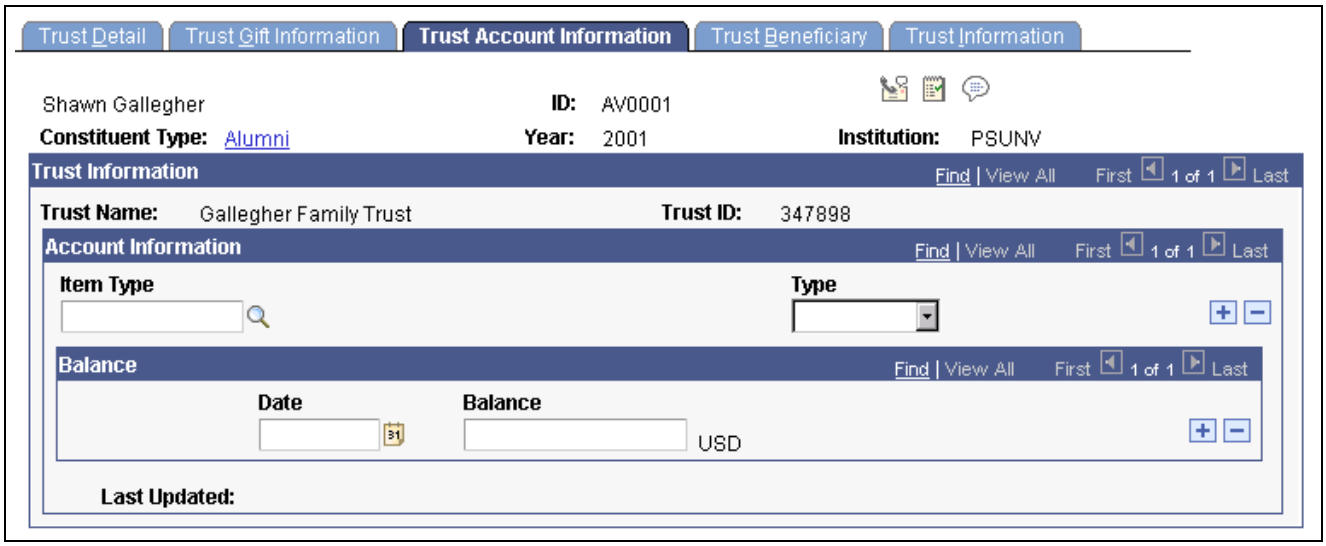
Value Source Enter a description of the person or publication providing information about the estimated value.

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.



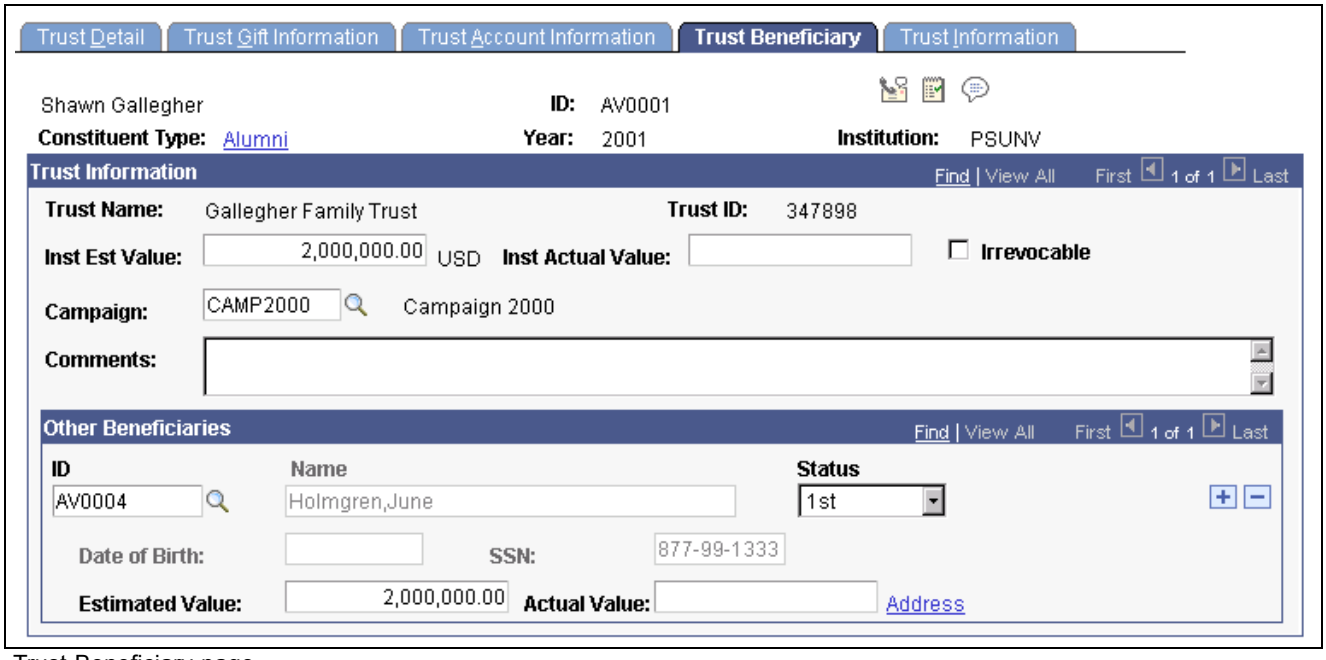
Trust Account Information page

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

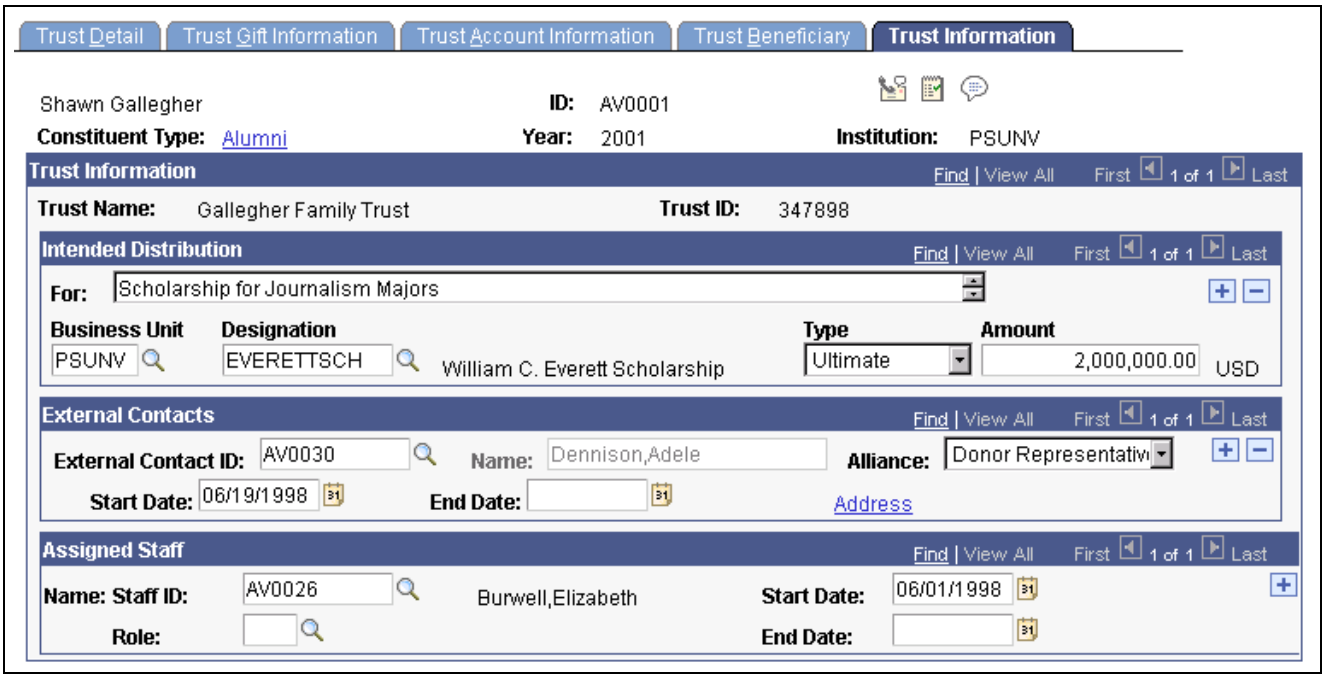
Access the Trust Beneficiary page.



Trust Beneficiary page

Defining Institutional Trust Information

Access the Trust Information page.



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:

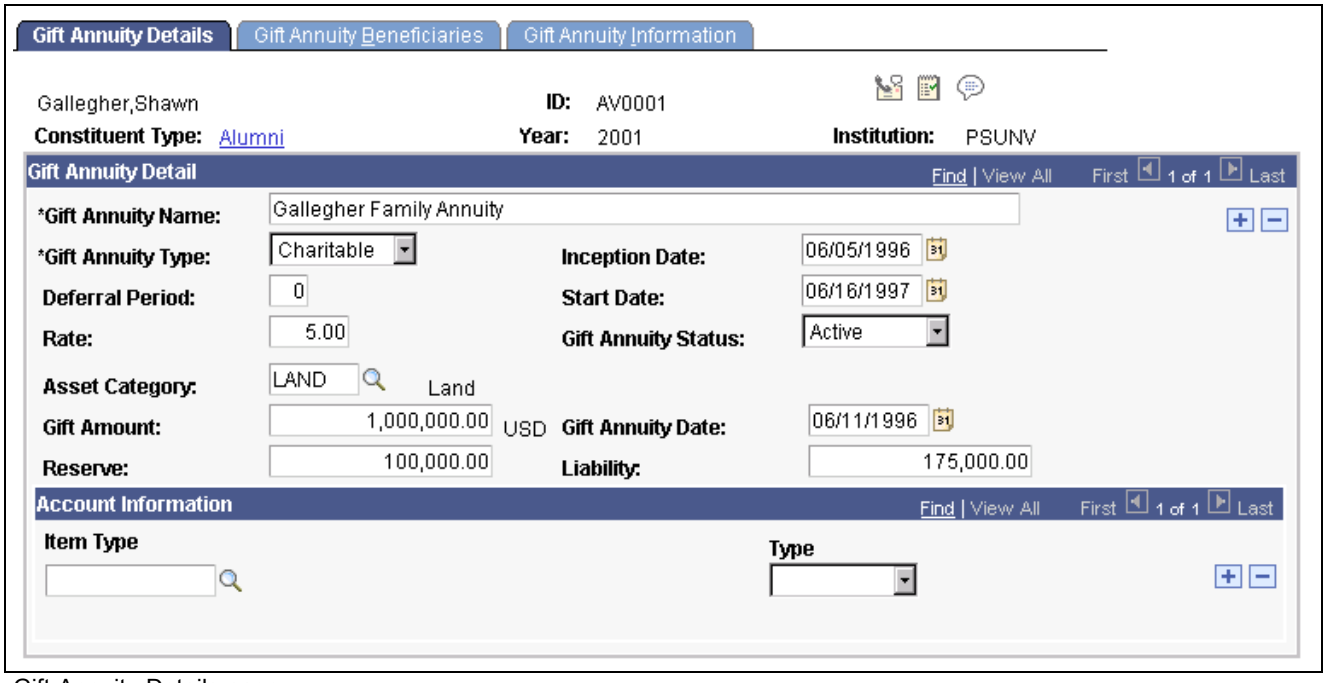
- Define gift annuity details.
- Define gift annuity beneficiaries.
- Define institutional gift annuity information.

Pages Used to Track Gift Annuities

Page Name	Object Name	Navigation	Usage
Gift Annuity Details	AV_GIFTAN_DTL	Contributor Relations, Prospect Management, Planned Giving, Gift Annuities, Gift Annuity Details	Enter detailed information about a donor's gift annuity to your institution.
Gift Annuity Beneficiaries	AV_GIFTAN_BFCY	Contributor Relations, Prospect Management, Planned Giving, 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	Contributor Relations, Prospect Management, Planned Giving, 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 page

Gift Annuity Name Enter the formal gift annuity name (up to 60 characters).

Gift Annuity Type Select a gift annuity type, *Charitable* or *Deferred.*

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 *Deferred,* 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:

Active: Select to add a new gift annuity.

Inactive: 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.

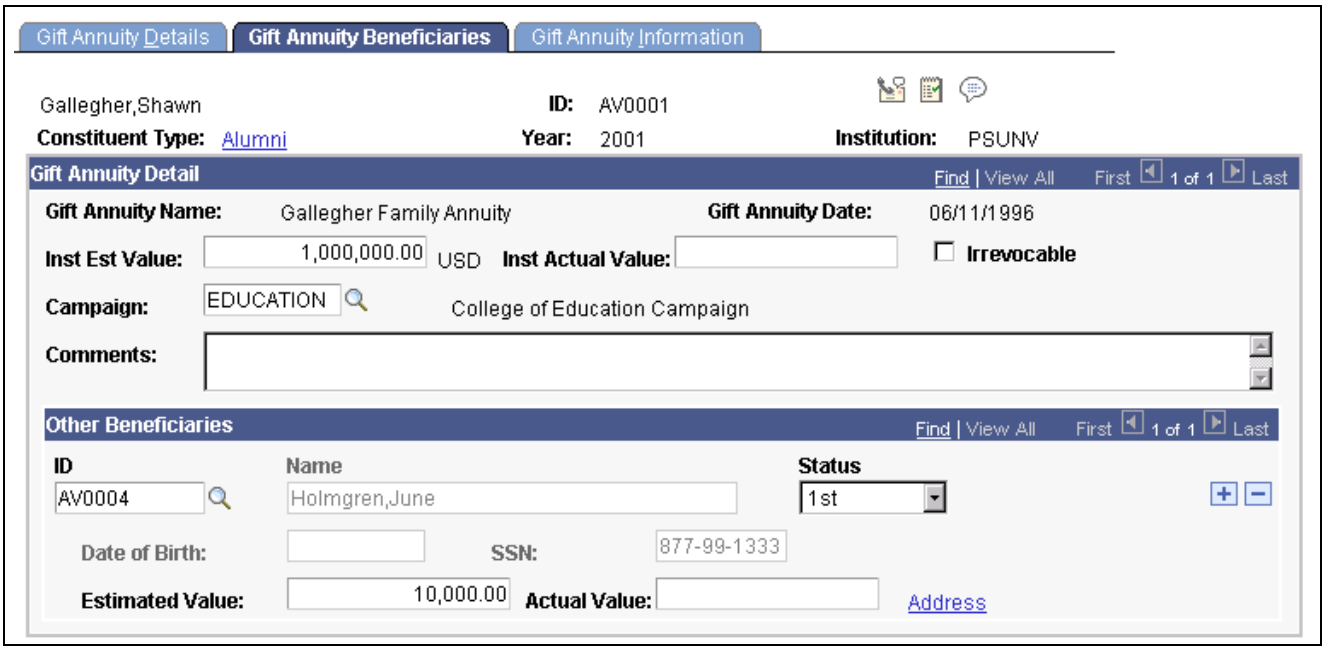
Reserve Enter the amount that your institution must carry to fund the annuity.

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

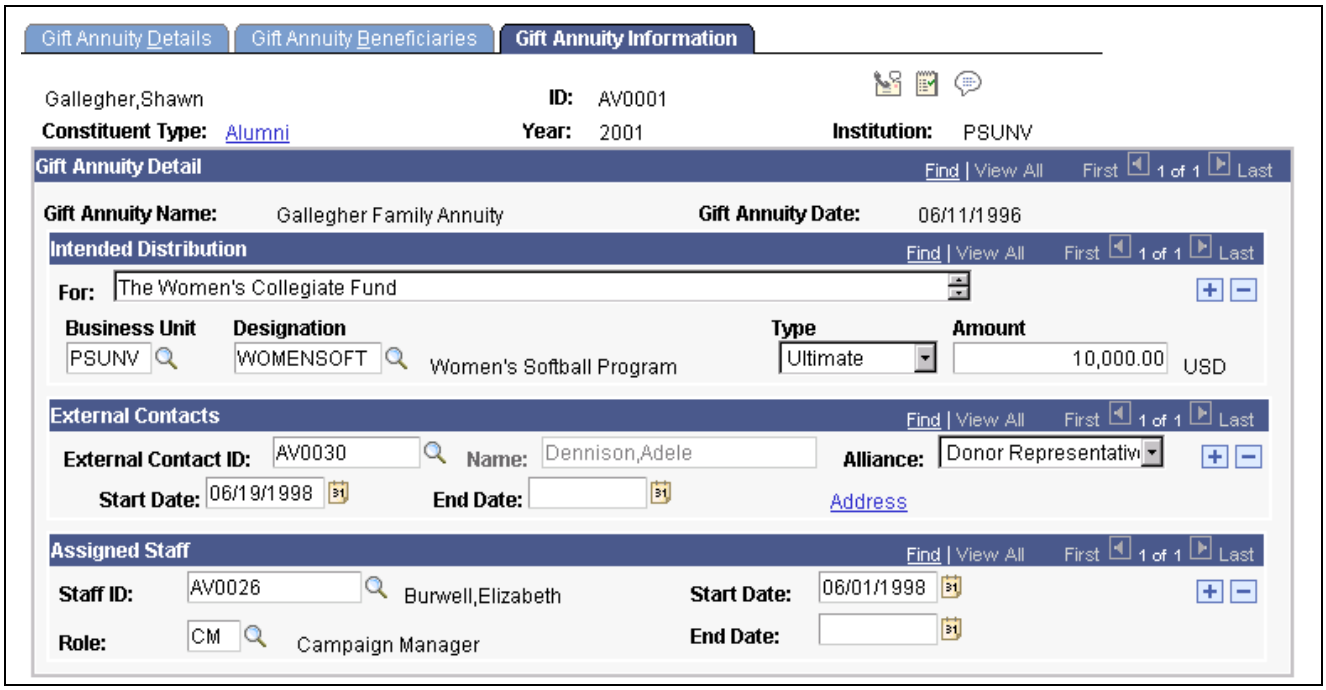
Access the Gift Annuity Beneficiaries page.



Gift Annuity Beneficiaries page

Defining Institutional Gift Annuity Information

Access the Gift Annuity Information page.



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:

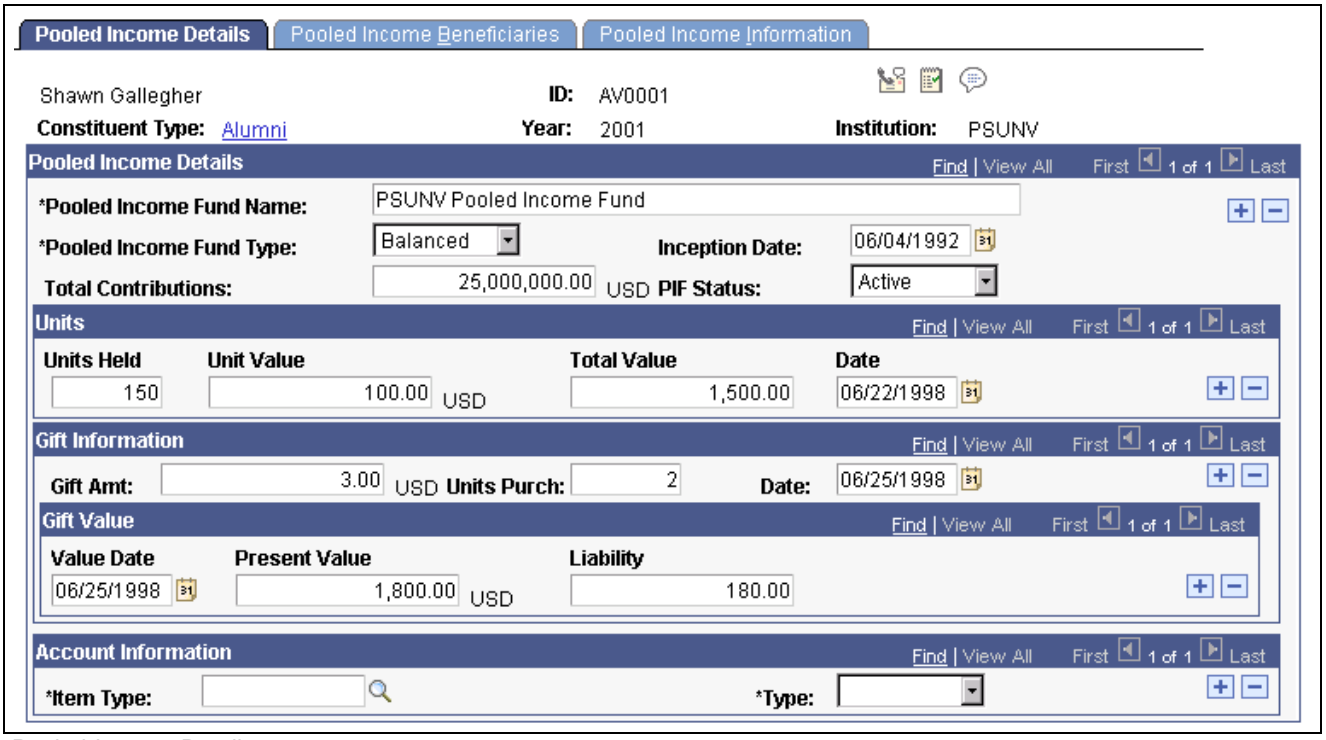
- Define pooled income fund details.
- Define pooled income fund beneficiaries.
- Define institutional pooled income fund information.

Pages Used to Track Pooled Income Funds

Page Name	Object Name	Navigation	Usage
Pooled Income Details	AV_PINC_DTL	Contributor Relations, Prospect Management, Planned Giving, 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	Contributor Relations, Prospect Management, Planned Giving, 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	Contributor Relations, Prospect Management, Planned Giving, 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 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

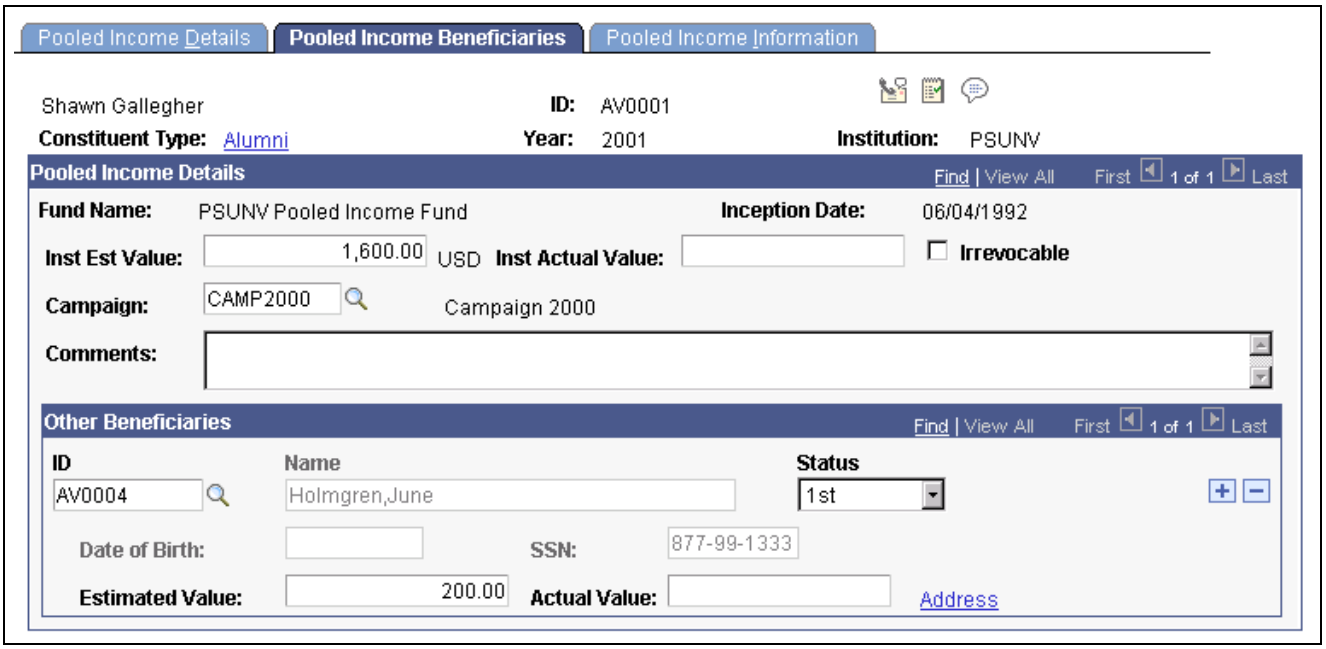
Units Held	Enter the total number of units that the donor has purchased in the pooled income fund.
Unit Value	Enter the monetary value of a single unit in the pooled income fund.
Total Value	Enter the total value of the units that the donor has purchased from within the pooled income fund.
Date	Select the date on which the total value was set.

Gift Information

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

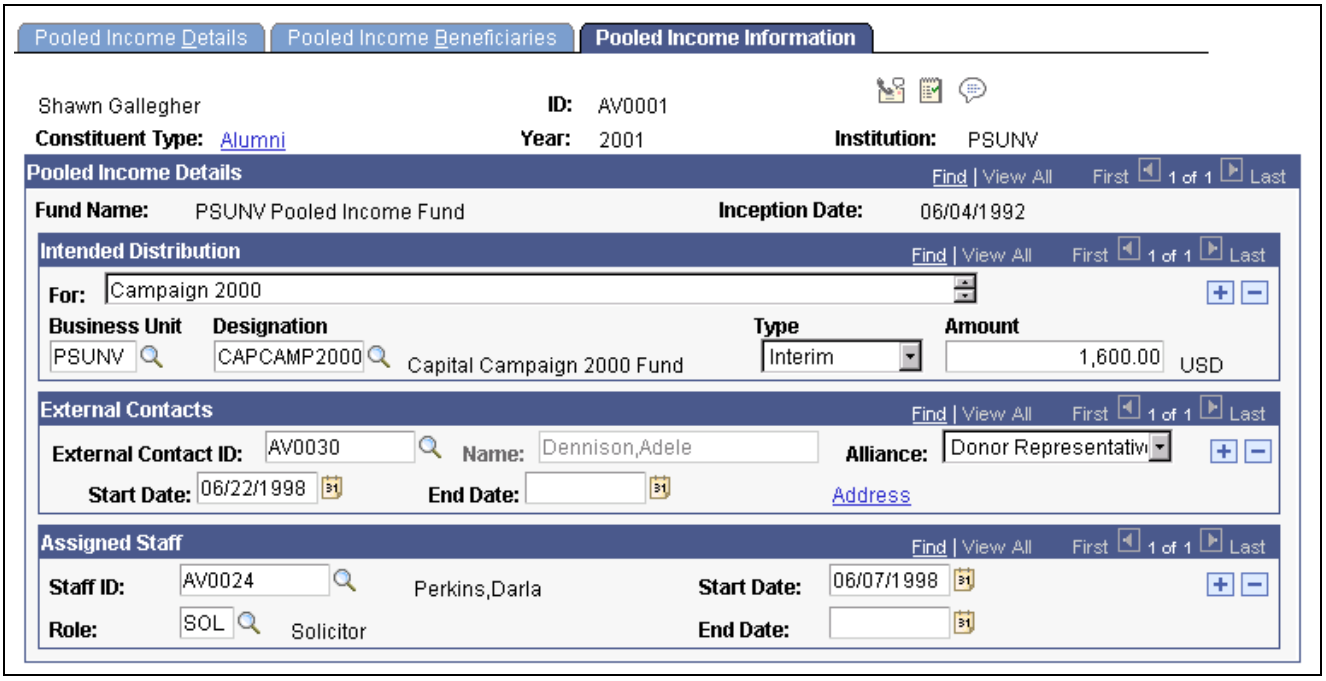
Access the Pooled Income Beneficiaries page.



Pooled Income Beneficiaries page

Defining Institutional Pooled Income Fund Information

Access the Pooled Income Information page.



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.

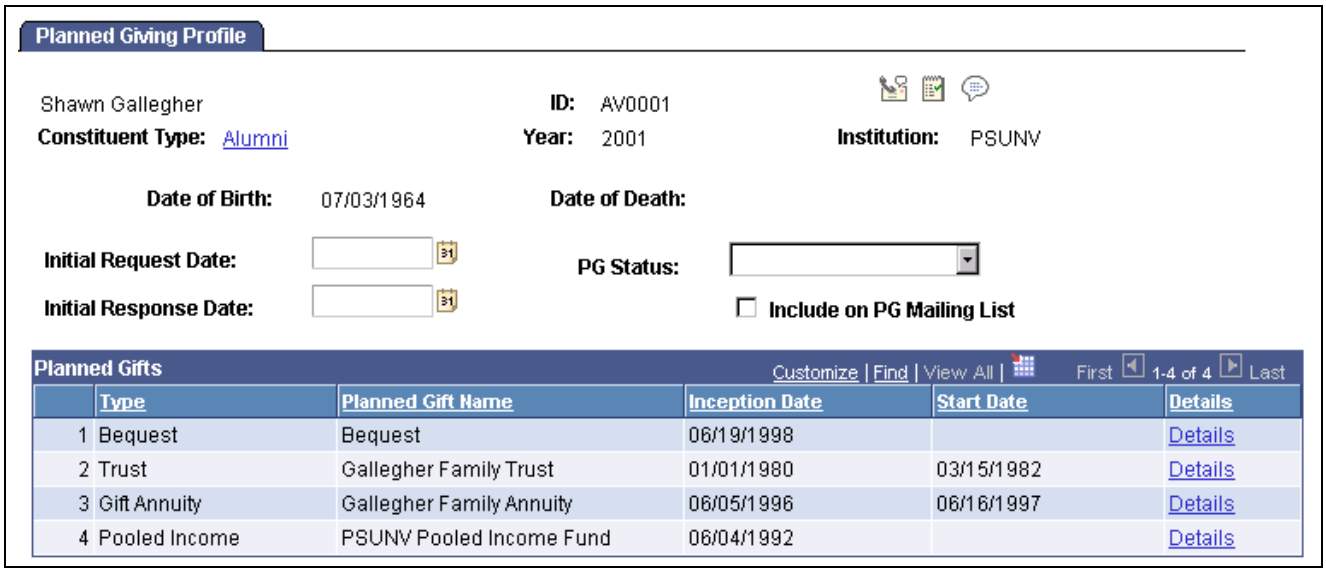
Pages Used to Work with a Planned Giving Profile

Page Name	Object Name	Navigation	Usage
Planned Giving Profile	AV_PG_PROFILE, AV_PG_PROFILE1	• Contributor Relations, Prospect Management, Planned Giving, Update Planned Giving Profile • Contributor Relations, Prospect Management, Planned Giving, View 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 for a bequest 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 for a trust 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.

Page Name	Object Name	Navigation	Usage
Gift Annuity Detail	AV_GIFTAN1_SP	Click the Details link for a gift annuity 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 for a pooled income gift 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	• 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 Trust 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 page

If Accessing Through the Update Planned Giving Profile 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.

If Accessing Through the View Planned Giving Profile 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 11

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.
- 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 12, "Managing Campaigns," page 257

Chapter 13, "Managing Membership," page 269

Chapter 14, "Managing Volunteers," page 305

Chapter 15, "Managing Event Initiatives," page 315

Chapter 16, "Managing Other Initiatives," page 321

Understanding Initiatives

This section lists prerequisites and discusses initiative management.

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 45

Initiative Management

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.

Defining an Initiative

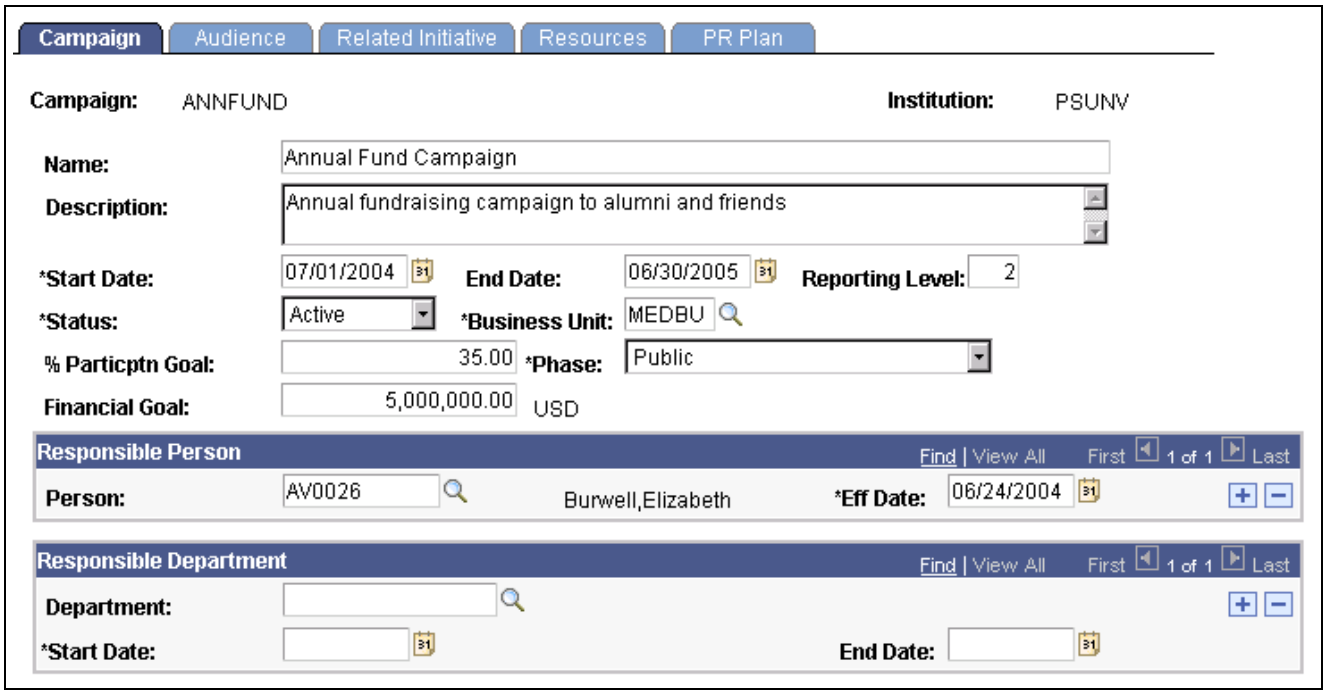
This section discusses how to create any type of initiative.

Pages Used to Define an Initiative

Page Name	Object Name	Navigation	Usage
Campaign	AV_INTV_CMPGN_MAIN	Contributor Relations, Initiatives, Campaign Initiatives, Manage Campaigns, Campaign Initiatives	Begin the process of defining a new campaign initiative at your institution.
Membership	AV_INTV_MEMBR_MAIN	Contributor Relations, Initiatives, Membership Initiatives, Membership Initiatives	Begin the process of defining a membership initiative at your institution.
Volunteers	AV_INTV_VOL_MAIN	Contributor Relations, Initiatives, Volunteer Initiatives, Manage Volunteer Initiatives, Volunteer Initiatives	Begin the process of defining a new volunteer initiative at your institution.
Event	AV_INTV_EVNT_MAIN	Contributor Relations, Initiatives, Event Initiatives, Manage Events, Event Initiatives	Begin the process of defining a new event initiative at your institution.
Other Initiatives	AV_INTV_OTHR_MAIN	Contributor Relations, Initiatives, Other Initiatives, Manage 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 page

Fields Common to All Initiatives

Name Name the initiative, up to 60 characters.

Reporting Level Enter a reporting level for the initiative. The highest reporting level is *1*. The lowest reporting level is *999*. You will receive an error message if you enter an incorrect reporting level.

A level *1* initiative cannot be related to another level *1* initiative of the same type. For example, a level *1* campaign cannot be related to another level *1* 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.

Business Unit

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.

% Particptn Goal (percent participation goal) and **Financial Goal** 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.

For campaign initiatives, these fields are used in the Campaign Progress Report. For memberships, these fields are used in the Membership Progress page.

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. When 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 Select a phase to indicate whether the initiative is currently *Private* or *Public.*

You may want to begin the campaign privately, identifying the pace-setting gifts that form the nucleus fund of the campaign. When the campaign has some momentum from the private phase, you can take it public to complete its goals.

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 link it 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 *PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook*, “Managing Campus Event Planning”.

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 *Campaign, Membership, Volunteer,* or *Event.*

Defining an Initiative Audience

This section discusses how to create an audience for an initiative. Audiences are populations and sub-populations of constituents related to an initiative.

Understanding Audiences

You need an audience to communicate; the Audience page helps you identify the 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.

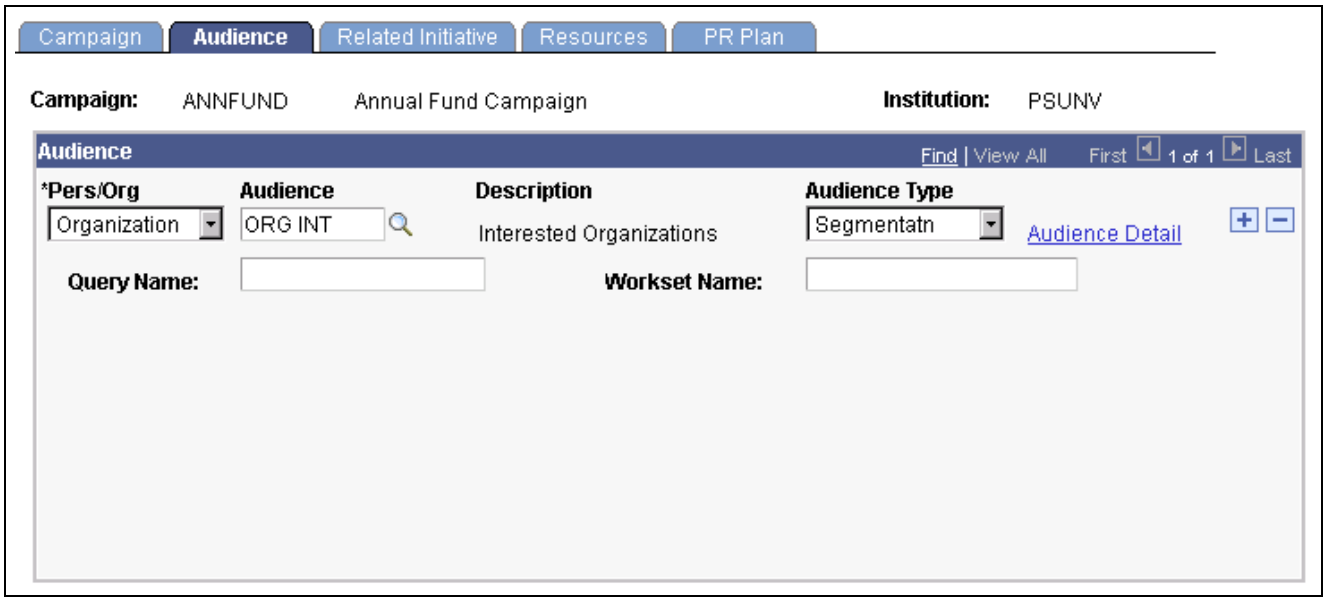
Pages Used to Define an Initiative Audience

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	• Contributor Relations, Initiatives, Campaign Initiatives, Manage Campaigns, Campaign Initiatives, Audience • Contributor Relations, Initiatives, Membership Initiatives, Membership Initiatives, Audience • Contributor Relations, Initiatives, Volunteer Initiatives, Manage Volunteer Initiatives, Audience • Contributor Relations, Initiatives, Event Initiatives, Manage Events, Audience • Contributor Relations, Initiatives, Other Initiatives, Manage Other Initiatives, 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.
Initiative Audience Build	AV_RUNCTL_INTV	Contributor Relations, Initiatives, Process Initiatives, Initiative Audience Build	Run the AVPINT process that builds the audiences that are used for initiatives.
Initiative Audience Merge	AV_RUNCTL_INTV_MRG	Contributor Relations, Initiatives, Process Initiatives, Initiative Audience Merge	Run the AVPIMRG COBOL 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.



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 the 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 to use Mass Change to assign communications to audience members.

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 Select the reason that the audience you entered has been chosen. Values for this field (*Segmentation, Reporting,* and *Administrative*) are delivered with the system as translate values. *Segmentation* is a required value. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.

Use *Reporting* to report the progress of the campaign. Use *Administrative* to create an audience of those responsible for the campaign. Use *Segmentation* for marketing purposes.

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. Review this information to ensure that you select the correct audience.

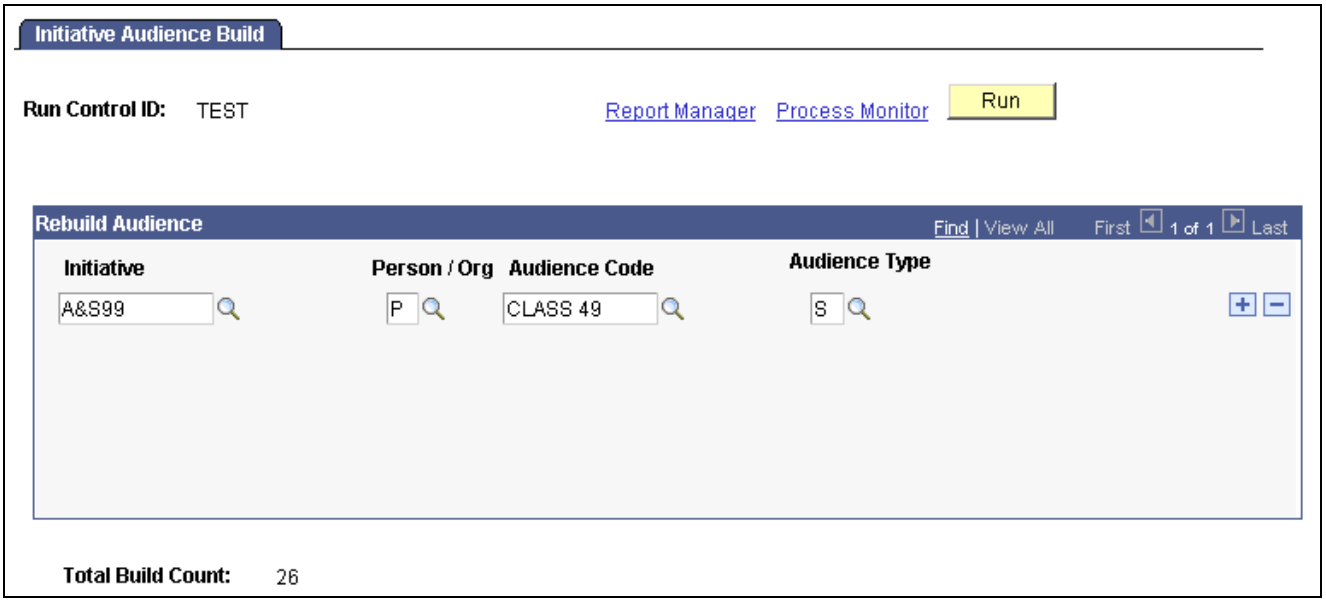
See Also

Chapter 6, "Setting Up Initiatives," Setting Up Attribute Types, page 51

Chapter 6, "Setting Up Initiatives," Setting Up Audience Criteria, page 53

Building the Audience

Access the Initiative Audience Build page.



Initiative Audience Build page

The Initiative Audience Build SQL process (AVPINT) generates the actual list of audience members and stores it in a temporary table called AV_INTV_TMP_TBL. After 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. After 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 you can run the Initiative Audience Build process.

Merging the Audience

When you click the Run button, Process Scheduler runs the Initiative Audience Merge Application Engine process (AVPIMRG COBOL) at user-defined intervals.

This process merges any audiences in the temporary table with the permanent table.

Linking Related Initiatives

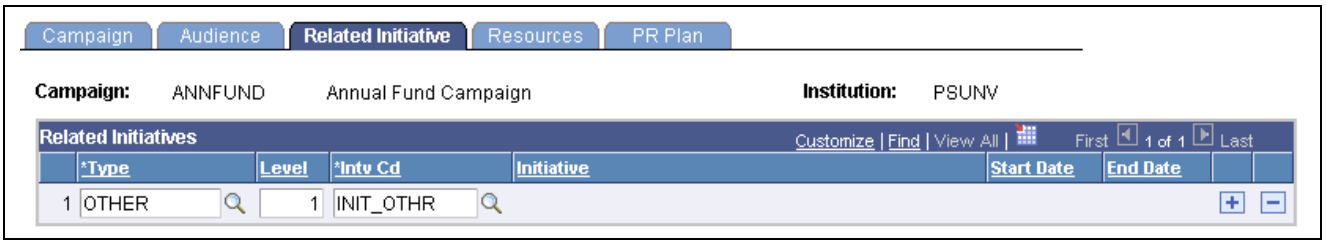
This section discusses how to link additional, related initiatives to the one you are creating.

Page Used to Link Related Initiatives

Page Name	Object Name	Navigation	Usage
Related Initiative	AV_INTV_CMPGN_RLTD, AV_INTV_EVNT_RLTD, AV_INTV_MEMBR_RLTD, AV_INTV_VOL_RLTD, AV_INTV_OTHR_RLTD	• Contributor Relations, Initiatives, Campaign Initiatives, Manage Campaigns, Campaign Initiatives, Related Initiatives • Contributor Relations, Initiatives, Membership Initiatives, Membership Initiatives, Related Initiatives • Contributor Relations, Initiatives, Volunteer Initiatives, Manage Volunteer Initiatives, Related Initiatives • Contributor Relations, Initiatives, Event Initiatives, Manage Events, Related Initiatives • Contributor Relations, Initiatives, Other Initiatives, Manage Other Initiatives, 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 initiative resources.

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	• Contributor Relations, Initiatives, Campaign Initiatives, Manage Campaigns, Campaign Initiatives, Resources • Contributor Relations, Initiatives, Membership Initiatives, Membership Initiatives, Resources • Contributor Relations, Initiatives, Volunteer Initiatives, Manage Volunteer Initiatives, Resources • Contributor Relations, Initiatives, Event Initiatives, Manage Events, Resources • Contributor Relations, Initiatives, Other Initiatives, Manage Other Initiatives, Other Initiatives, Resources	Maintain information about the human resources that support an initiative.

Assigning Initiative Resources

Access the Resources page.



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.

Resource Type Assign a volunteer as a resource. Values include *Initiative* or *Mbr Org* (member organization).

Initiative Type If you selected *Initiative* as a resource type, select an initiative type associated with the volunteer.

Initiative If you selected *Initiative* as a resource type, select the initiative with which the volunteer is associated.

Mbr Org Code If you selected *Mbr Org* 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

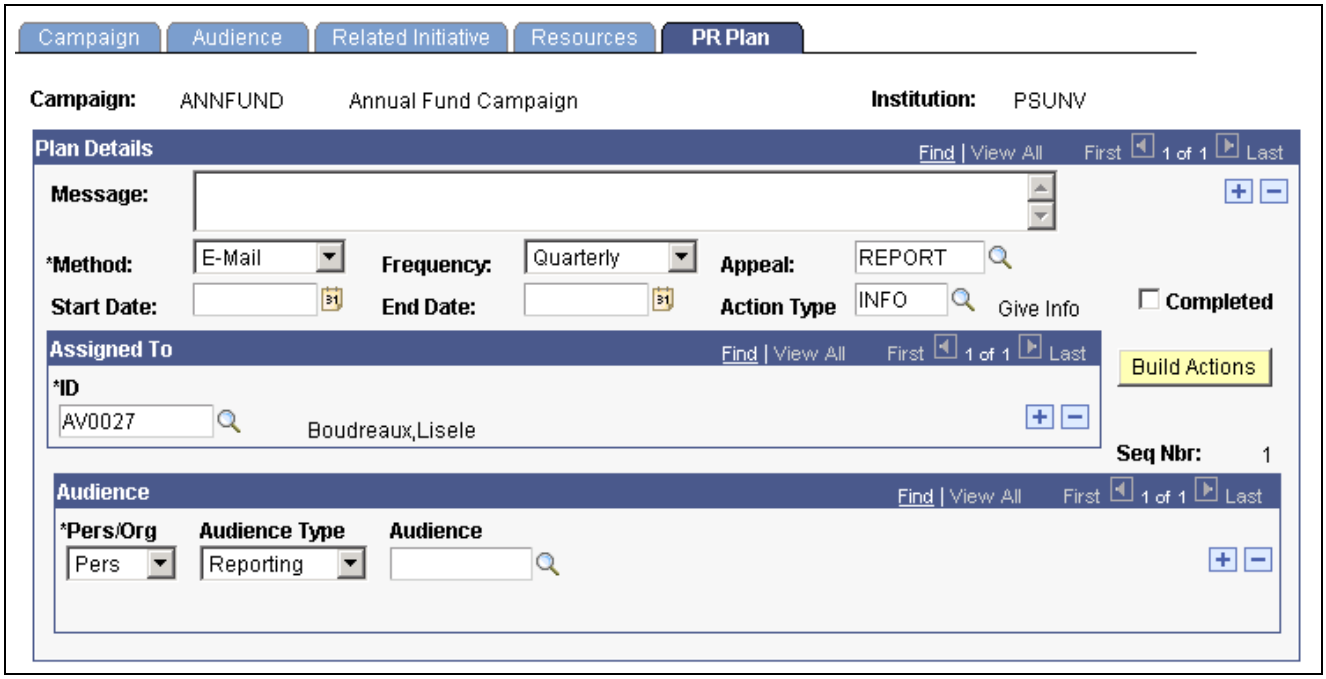
This section discusses how to define a public relations plan for an initiative.

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	• Contributor Relations, Initiatives, Campaign Initiatives, Manage Campaigns, Campaign Initiatives, PR Plan • Contributor Relations, Initiatives, Membership Initiatives, Membership Initiatives, PR Plan • Contributor Relations, Initiatives, Volunteer Initiatives, Manage Volunteer Initiatives, PR Plan • Contributor Relations, Initiatives, Event Initiatives, Manage Events, PR Plan • Contributor Relations, Initiatives, Other Initiatives, Manage Other Initiatives, Other Initiatives, 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 the 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

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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 After you have specified a message, method, frequency, appeal, assigned ID, and audience, click this button. The system generates initiative actions that correspond with the 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 the steps carefully. Be certain that the dates and frequency—as well as the values in the 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. After 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 the 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.

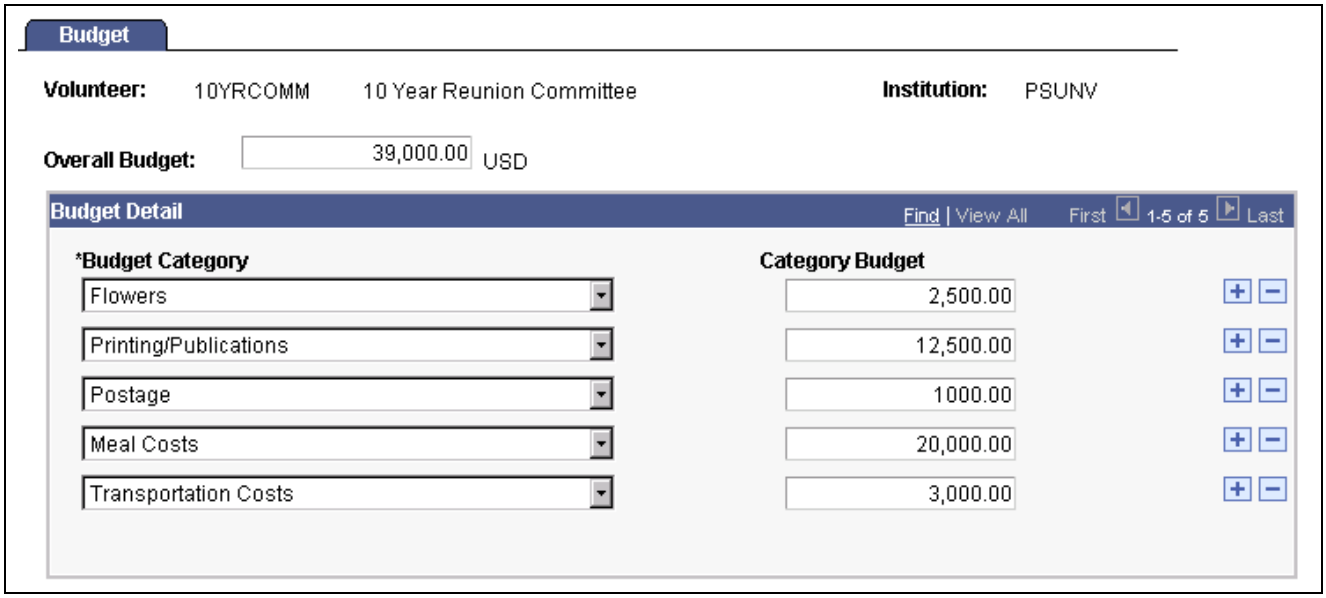
Note. Your Contributor Relations budget system does not support links to your institution's financial system.

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	• Contributor Relations, Initiatives, Campaign Initiatives, Manage Campaigns, Campaign Budget • Contributor Relations, Initiatives, Membership Initiatives, Membership Budget • Contributor Relations, Initiatives, Volunteer Initiatives, Manage Volunteer Initiatives, Volunteer Budget • Contributor Relations, Initiatives, Event Initiatives, Manage Events, Event Budget • Contributor Relations, Initiatives, Other Initiatives, Manage Other Initiatives, Other Initiative 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	• Contributor Relations, Initiatives, Campaign Initiatives, Manage Campaigns, Campaign Budget Detail • Contributor Relations, Initiatives, Membership Initiatives, Membership Budget Detail • Contributor Relations, Initiatives, Volunteer Initiatives, Manage Volunteer Initiatives, Volunteer Budget Detail • Contributor Relations, Initiatives, Event Initiatives, Manage Events, Event Budget Detail • Contributor Relations, Initiatives, Other Initiatives, Manage Other Initiatives, Other Initiative Budget Detail	Track the specific expenses for an initiative.

Creating a Budget

Access the Budget page.



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.

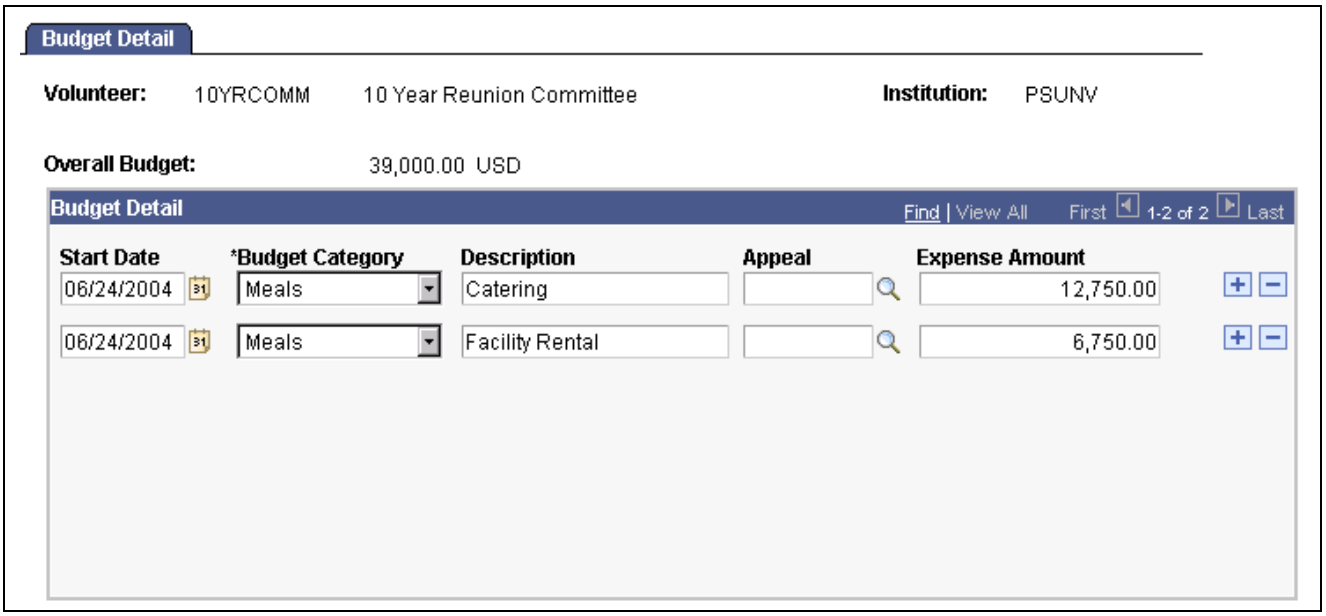
Category Budget Enter the amount of the overall budget allocated to the category that you selected.

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 Contributor Relations does not link to the Financials system.

Tracking Budget Expenses

Access the Budget Detail page.



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 (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.

You must link each expense with an appeal to accurately track expenses for that appeal.

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:

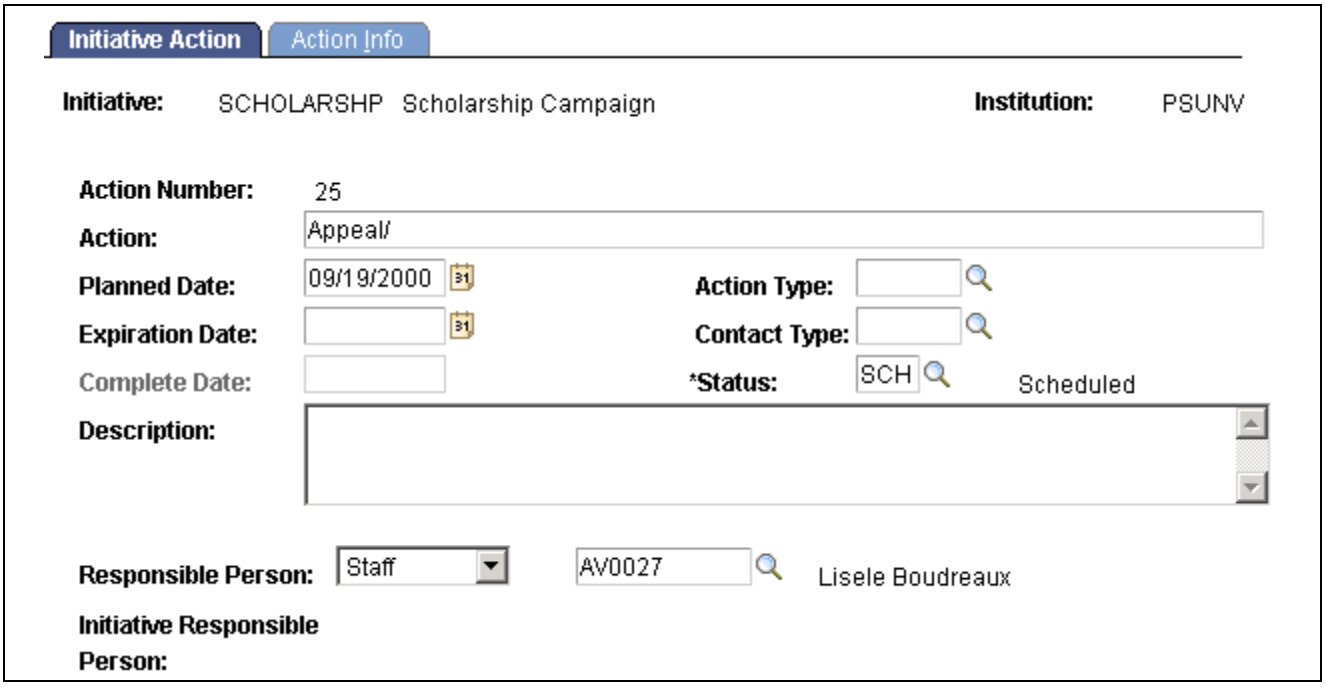
- Create actions associated with an initiative.
- Add action information.

Pages Used to Create Initiative Actions

Page Name	Object Name	Navigation	Usage
Initiative Action	AV_INTV_ACTN	• Contributor Relations, Initiatives, Campaign Initiatives, Campaign Actions, Initiative Action • Contributor Relations, Initiatives, Membership Initiatives, Membership Actions, Initiative Action • Contributor Relations, Initiatives, Event Initiatives, Manage Event Initiatives, Event Actions, Initiative Action • Contributor Relations, Initiatives, Volunteer Initiatives, Manage Volunteer Initiatives, Volunteer Initiative Actions, Initiative Action • Contributor Relations, Initiatives, Other Initiatives, Other Initiative Actions, Initiative Action	Create actions associated with an initiative.
Action Info (action information)	AV_INTV_ACTN2	• Contributor Relations, Initiatives, Campaign Initiatives, Campaign Actions, Action Info • Contributor Relations, Initiatives, Membership Initiatives, Membership Actions, Action Info • Contributor Relations, Initiatives, Event Initiatives, Manage Event Initiatives, Event Actions, Action Info • Contributor Relations, Initiatives, Volunteer Initiatives, Manage Volunteer Initiatives, Volunteer Initiative Actions, Action Info • Contributor Relations, Initiatives, Other Initiatives, Other Initiative Actions, Action Info	Continue the process of adding actions associated with an initiative.

Entering Initiative Action Information

Access the Initiative Action page.



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 *Design Session, Hire Contractor,* 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 *telephone call, letter, email, personal visit,* and so on. Contact types are defined by your institution.

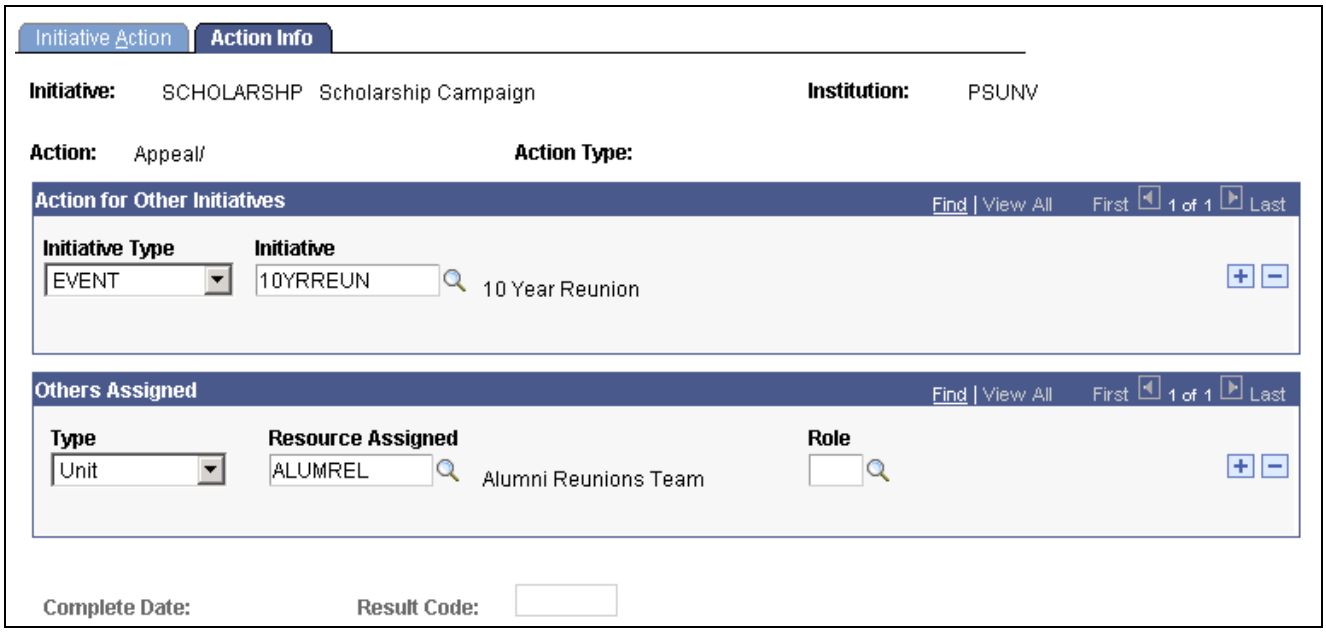
Description Describe the action, using up to 250 characters. Your description can include information about the purpose and goal of the action, and any other information needed to complete the action such as a contact phone number.

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.



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 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.

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 Initiative Action Summary Information

This section discusses how to:

- View to do lists.
- 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	Contributor Relations, Initiatives, Initiative Actions, Initiative 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 Resource Assignment button on the Action Detail page.	View additional information about related initiatives and those assigned to the action.

Viewing To Do Lists

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 9, “Managing Prospects,” Viewing To Do Lists, page 205.

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	• Contributor Relations, Initiatives, Campaign Initiatives, Campaign Related Goals Summary • Contributor Relations, Initiatives, Membership Initiatives, Membership Related Goals • Contributor Relations, Initiatives, Volunteer Initiatives, Volunteer Related Goal Summary • Contributor Relations, Initiatives, Event Initiatives, Event Related Goals • Contributor Relations, Initiatives, Other Initiatives, Other Initiative Related Goals	View information about goals for initiatives related to the initiative you are working with.

Viewing Related Goal Information

Access the Related Goals page. 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	• Contributor Relations, Initiatives, Campaign Initiatives, Campaign Related Resources • Contributor Relations, Initiatives, Membership Initiatives, Membership Related Resources • Contributor Relations, Initiatives, Volunteer Initiatives, Initiative Volunteers, Volunteer Related Resources • Contributor Relations, Initiatives, Event Initiatives, Event Related Resources • Contributor Relations, Initiatives, Other Initiatives, Related Initiative Resources	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 the system prior to working with mass change.

Understanding Mass Change

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 the 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-Intv-Delete and CR-Intv-Insert3CEngine.

The two mass change definitions are described below:

1. *CR-Intv-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-Intv-Insert3CEngine. This criterion prevents the membership and initiative mass change functions from deleting records belonging to the other function.

2. *CR-Intv-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-Intv-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-Mbrshp-Delete and CR-Mbrshp-Insert3CEngine.

The two mass change definitions are described below:

1. *CR-Mbrshp-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-Mbrshp-Insert3CEngine. This criterion prevents the membership and initiative mass change functions from deleting records belonging to the other function.

2. *CR-Mbrshp-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_MBRSHP_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-Mbrshp-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.

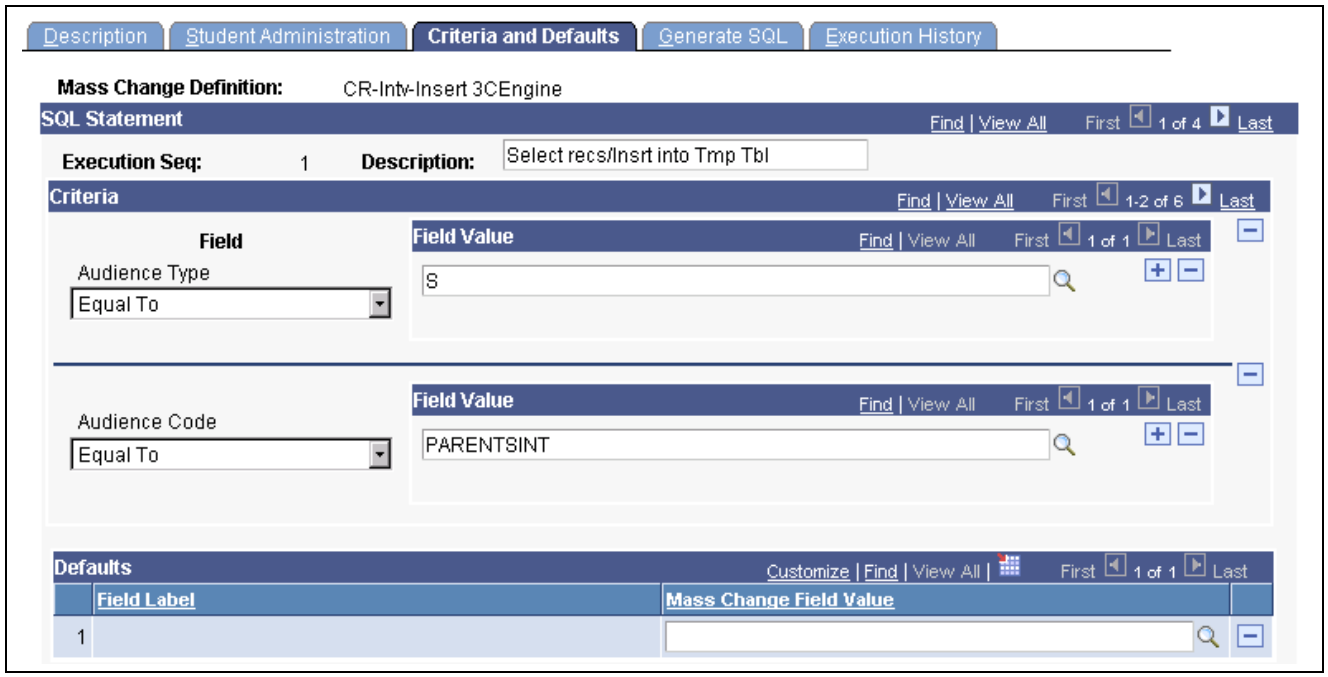
Page Used to Use Mass Change for Initiative and Membership Letters

Page Name	Object Name	Navigation	Usage
Criteria and Defaults	MC_DEFN_01	Contributor Relations, Initiatives, Process Initiatives, Initiative Mass Change, 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.

Selecting Criteria and Defaults

Access the Criteria and Defaults page.

Note. If you are running mass change for an initiative, select the CR-Intv-Insert3CEngine mass change definition. If you are running mass change for a membership organization, select the CR-Mbrshp-Insert3CEngine mass change definition.



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 the 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 the Mass Change SQR Process (MASSCHNG)

Access the Run Mass Change page. To generate mass communications changes for Contributor Relations, only use these fields:

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 the 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.

After the Mass Change process runs, data is written to the communications record.

See *PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook*, “Managing Communications”.

CHAPTER 12

Managing Campaigns

This chapter provides an overview of campaign management and discusses how to:

- Manage general initiative information.
- Set campaign initiative goals.
- Create campaign actions.
- View prospect lists.
- Generate campaign progress reports.
- View top donors to a campaign.
- View campaign initiative summary information.

See Also

Chapter 6, "Setting Up Initiatives," Setting Up Campaigns, page 60

Understanding Campaign Management

This section lists prerequisites and discusses campaign management.

Prerequisites

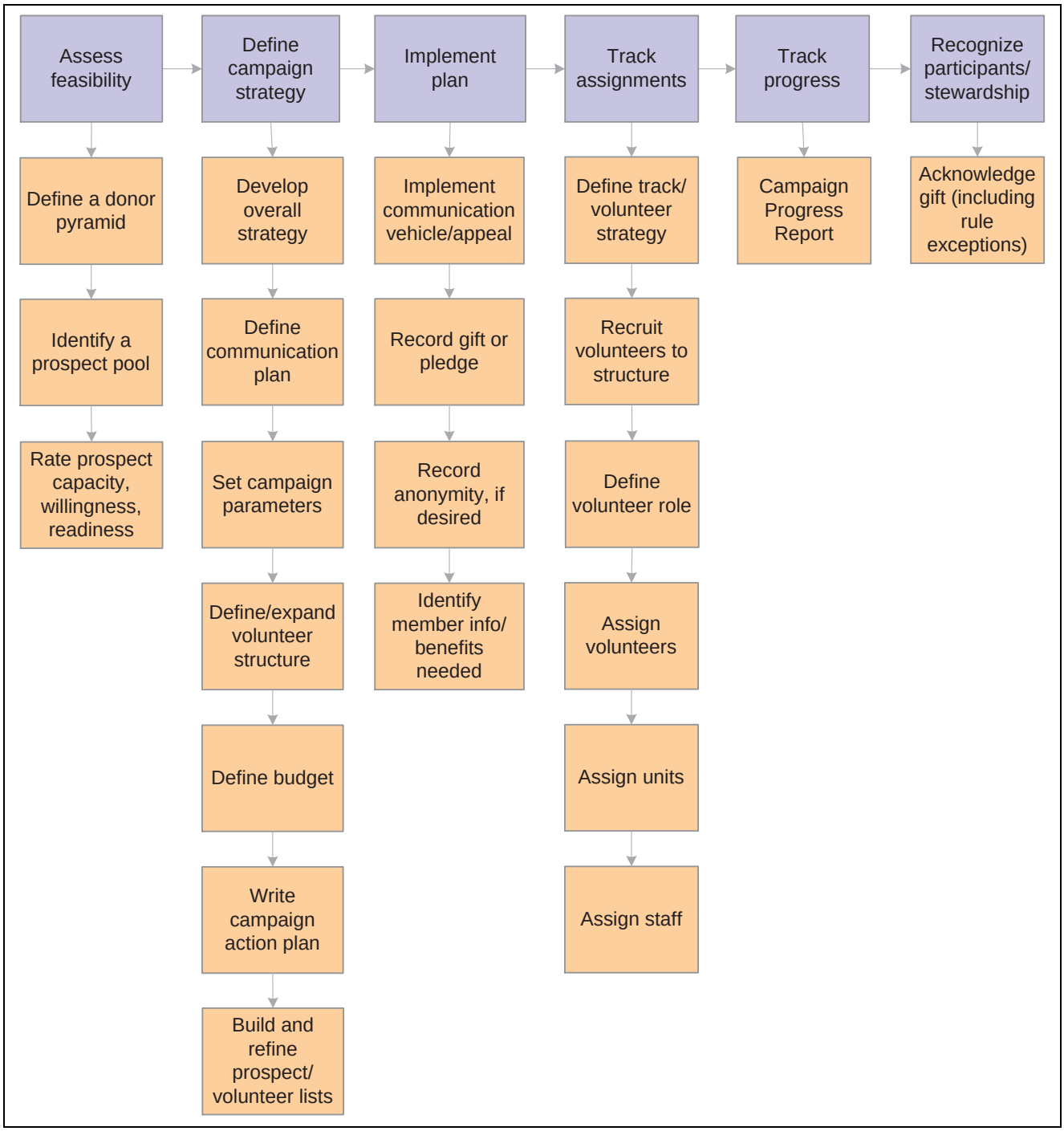
Before you can manage a campaign, you must have one set up. There are common initiative setup pages for this task, and also campaign-specific setup pages that enable you to complete campaign setup.

See Chapter 6, "Setting Up Initiatives," Setting Up Campaigns, page 60.

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. After 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 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 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 11, “Managing Initiatives,” page 227

Managing General Initiative Information

You manage campaigns in 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.

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 11, "Managing Initiatives," page 227.

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:

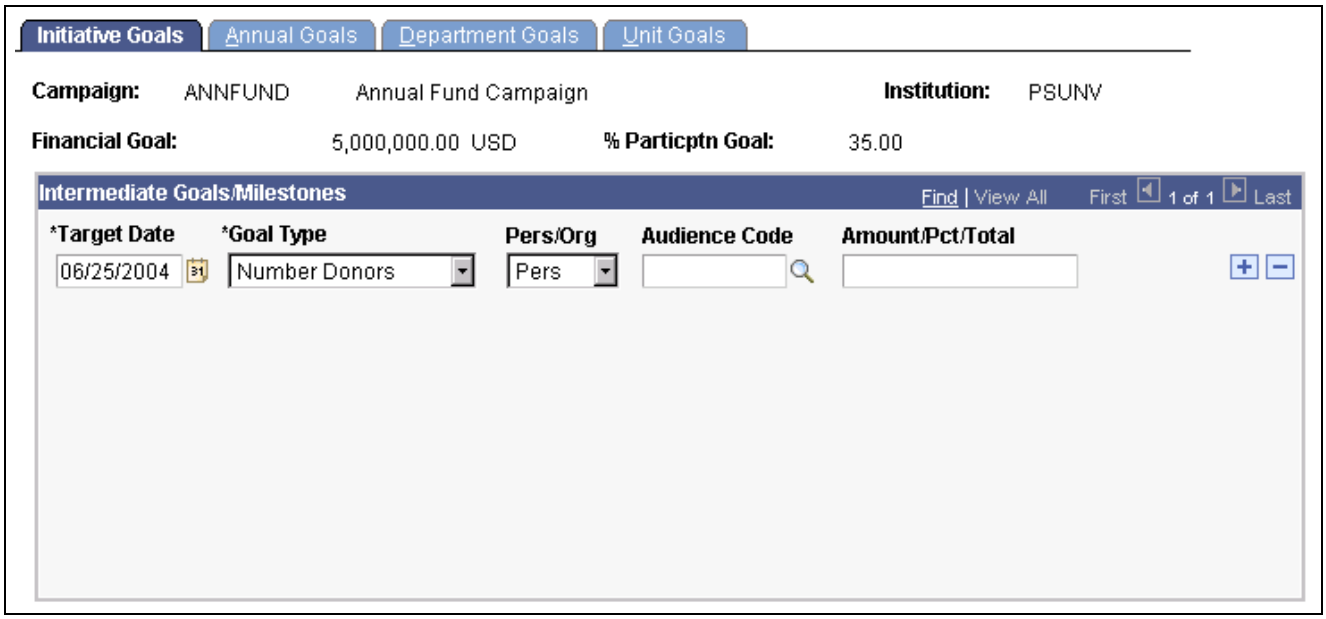
- Set intermediate goals.
- Set annual goals.
- Set unit goals.
- Set department goals.

Pages Used to Set Campaign Initiative Goals

Page Name	Object Name	Navigation	Usage
Initiative Goals	AV_INTV_CMPGN_GOAL	Contributor Relations, Initiatives, Campaign Initiatives, Manage Campaigns, Campaign Goals, Initiative Goals	Set intermediate goals or milestone for an initiative.
Annual Goals	AV_CMPGN_ANNUAL	Contributor Relations, Initiatives, Campaign Initiatives, Manage Campaigns, Campaign Goals, Annual Goals	Set goals for each year of the campaign cycle.
Department Goals	AV_CMPGN_DEPT_GOAL	Contributor Relations, Initiatives, Campaign Initiatives, Manage Campaigns, Campaign Goals, Department Goals	Set campaign goals for specific departments at your institution.
Unit Goals	AV_CMPGN_UNIT_GOAL	Contributor Relations, Initiatives, Campaign Initiatives, Manage Campaigns, 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.



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.

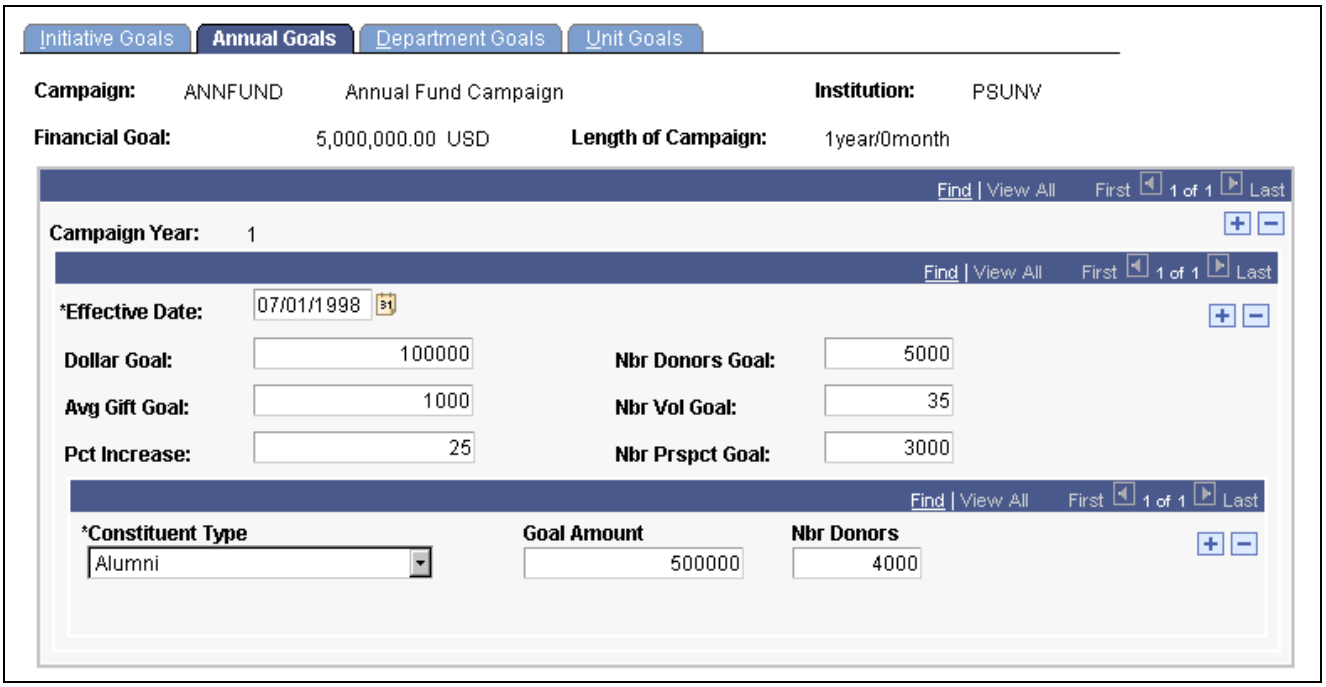
Target Date Select the target date or date by which the goal might be reached.

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.



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.

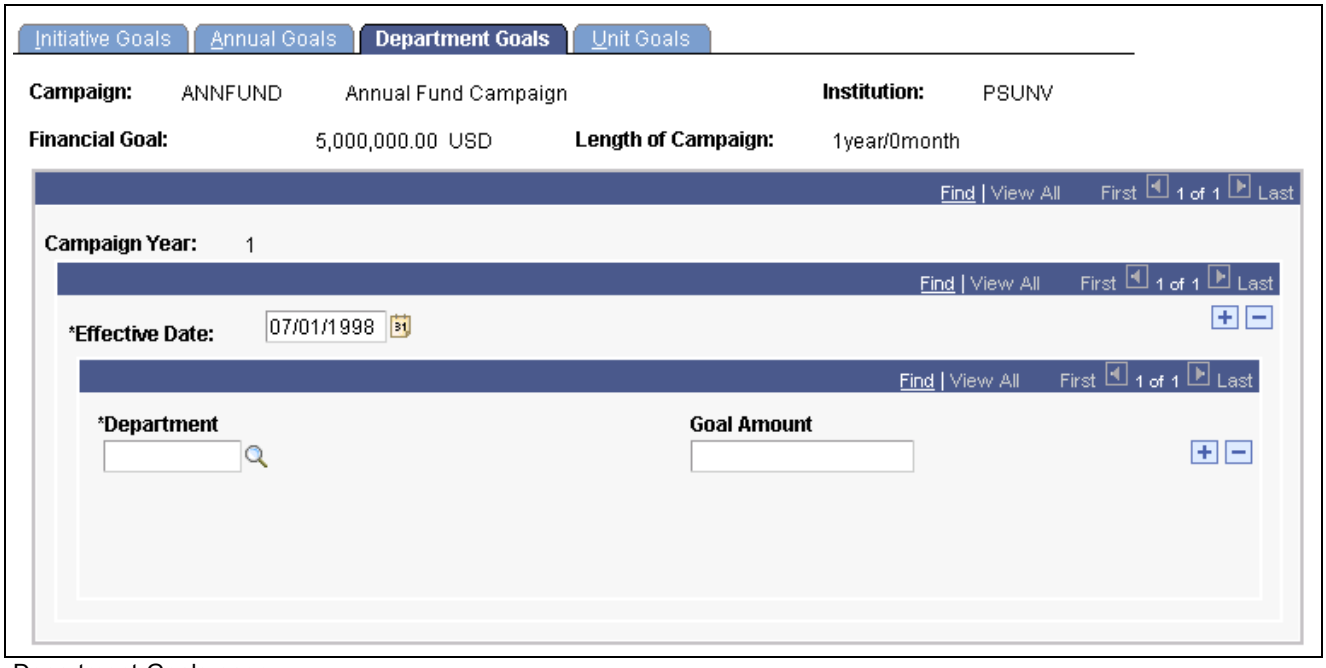
Goal Amount — Enter the amount to receive from constituents who share a particular constituent type.

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.



Department Goals page

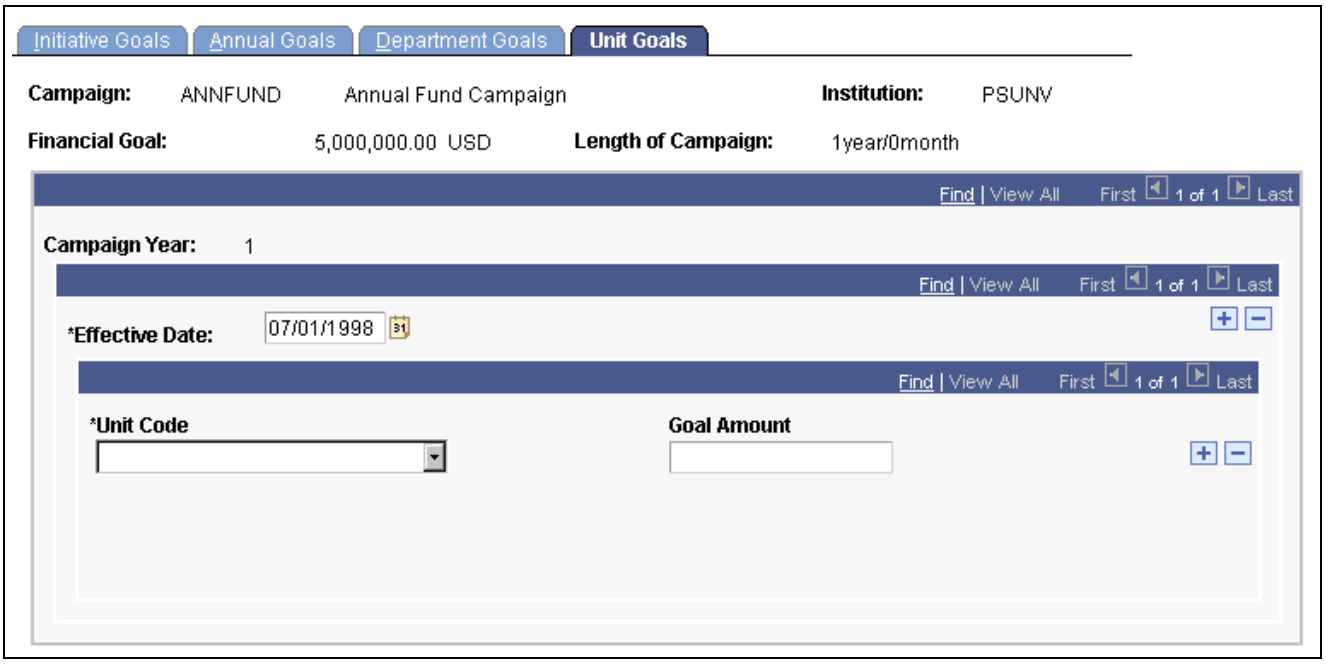
Departments at your institution can be assigned a total dollar amount that is their goal amount to raise for each campaign year.

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.



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	Contributor Relations, Initiatives, Campaign Initiatives, 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

Access the Prospect List page. 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 21

Generating the Campaign Progress Report

This section discusses how to generate campaign progress reports.

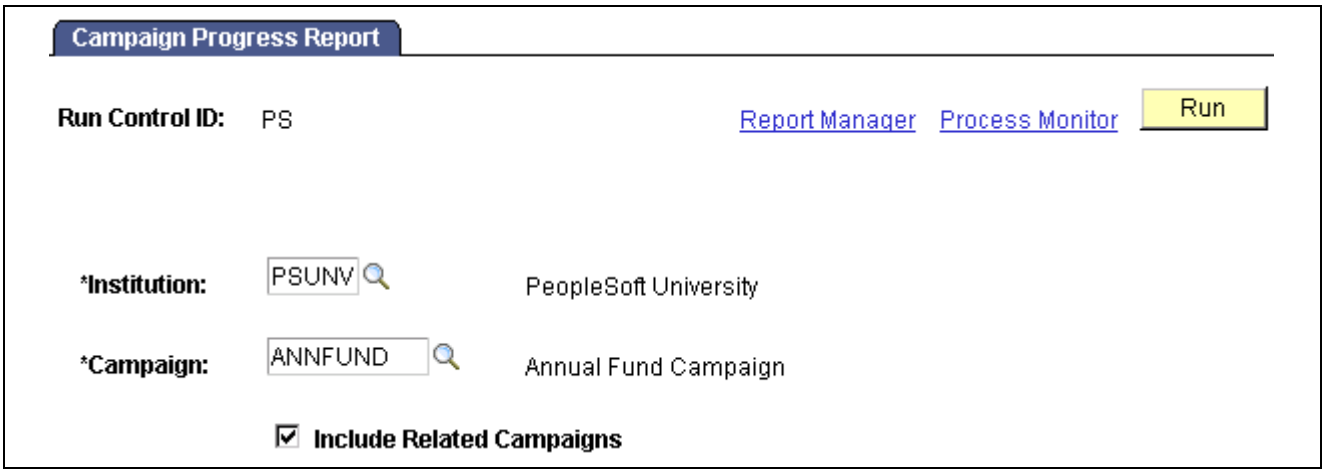
Page Used to Generate the Campaign Progress Report

Page Name	Object Name	Navigation	Usage
Campaign Progress Report	AV_RUNCTL_CAMPR	Contributor Relations, CR Reports, Giving Reports, 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 C, "PeopleSoft Contributor Relations Reports," Contributor Relations Reports: Selected Reports, page 518

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 to a Campaign

Page Name	Object Name	Navigation	Usage
Top Donors	AV_CMPGN_TTG_LIST	Contributor Relations, Initiatives, Campaign Initiatives, Top Campaign Donors	View summary information about the top donors to a campaign.

Viewing Top Donor Summaries

Access the Top Donors page. 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 21

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	Contributor Relations, Initiatives, Campaign Initiatives, 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.

Viewing Campaign Summary Information

Access 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.

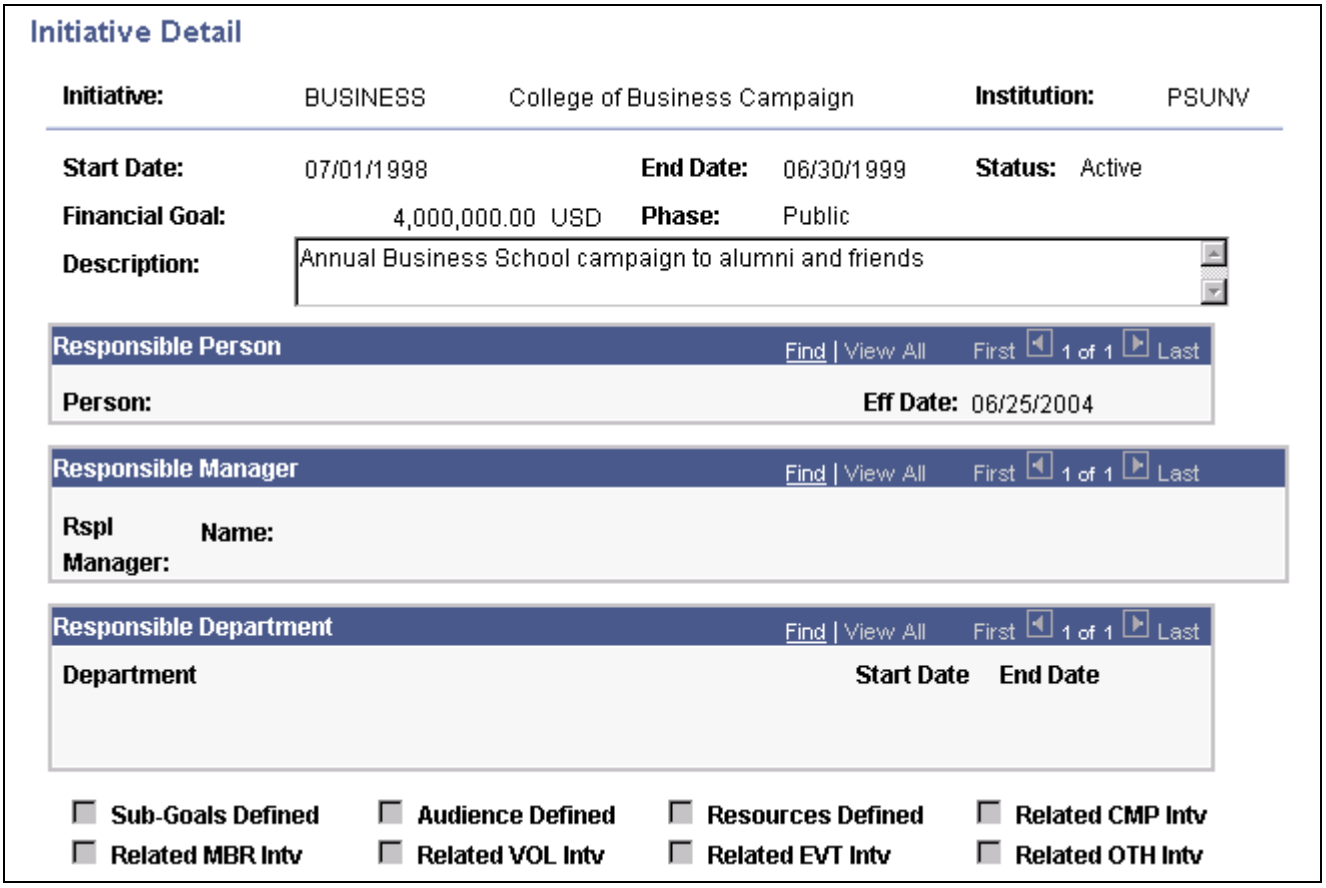
Details Click this link to access the Initiative Detail Page, which displays detailed information about the campaign.

See Also

Chapter 11, "Managing Initiatives," Defining an Initiative, page 228

Viewing Initiative Details

Access the Initiative Detail page.



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 13

Managing Membership

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

- Manage general initiative information.
- Create a member organization.
- Create membership actions.
- Build and merge membership lists.
- 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 a membership summary or a supervisor's membership summary.

See Also

Chapter 6, "Setting Up Initiatives," Setting Up Membership Initiatives, page 65

Understanding Membership

This section lists prerequisites and common elements and discusses membership management.

Prerequisites

Before you can manage a membership initiative, you must set one 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 45.

Common Elements Used in This Chapter

ID Type Identify the constituent as a *Person* or an *Organization.*

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)	If adding memberships, click to access the Membership Entry page, where you can add another membership payment or complimentary membership in the session. If adjusting memberships, click to access the Membership Adjustment Summary page, where you can select another membership payment number for adjustment.
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.

Membership Management

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 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 for 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 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 11, “Managing Initiatives,” Understanding Initiatives, page 227

Managing General Initiative Information

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

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 11, “Managing Initiatives,” page 227.

Creating a Member Organization

This section provides an overview of member organizations and 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.

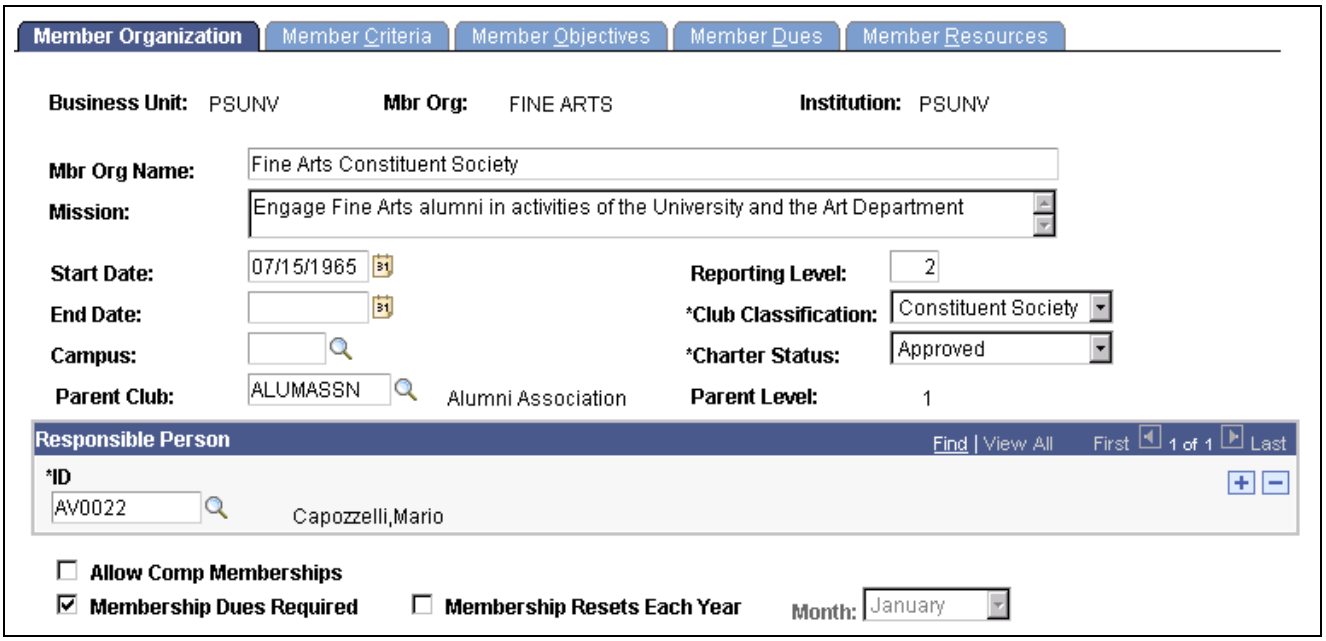
In other cases membership can be based strictly on the existence of a particular attribute on a constituent's record. In this instance organization membership rosters are generated through an automated process that links the qualifying constituents to the member organization.

Pages Used to Create a Member Organization

Page Name	Object Name	Navigation	Usage
Member Organization	AV_MBR_ORG	Contributor Relations, Membership Organizations, Manage Member Organizations, Member Organization, Member Organization	Begin the process of defining a member organization at your institution.
Member Criteria	AV_MBR_CRIT	Contributor Relations, Membership Organizations, Manage Member Organizations, 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	Contributor Relations, Membership Organizations, Manage Member Organizations, Member Organization, Member Objectives	Define the aims of the member organization in terms of advancing your institution.
Member Dues	AV_MBR_DUES	Contributor Relations, Membership Organizations, Manage Member Organizations, Member Organization, Member Dues	Define the dues, levels, designations, and benefits for member organizations that require payment of dues.
Member Resources	AV_MBR_RESOURCES	Contributor Relations, Membership Organizations, Manage Member Organizations, 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 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 *1*. A level 1 member organization cannot be related to another level 1 member organization.

Club Classification Identify the member organization as a *chapter, alumni association, constituent society,* 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) 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 bestow a complimentary association membership.

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.

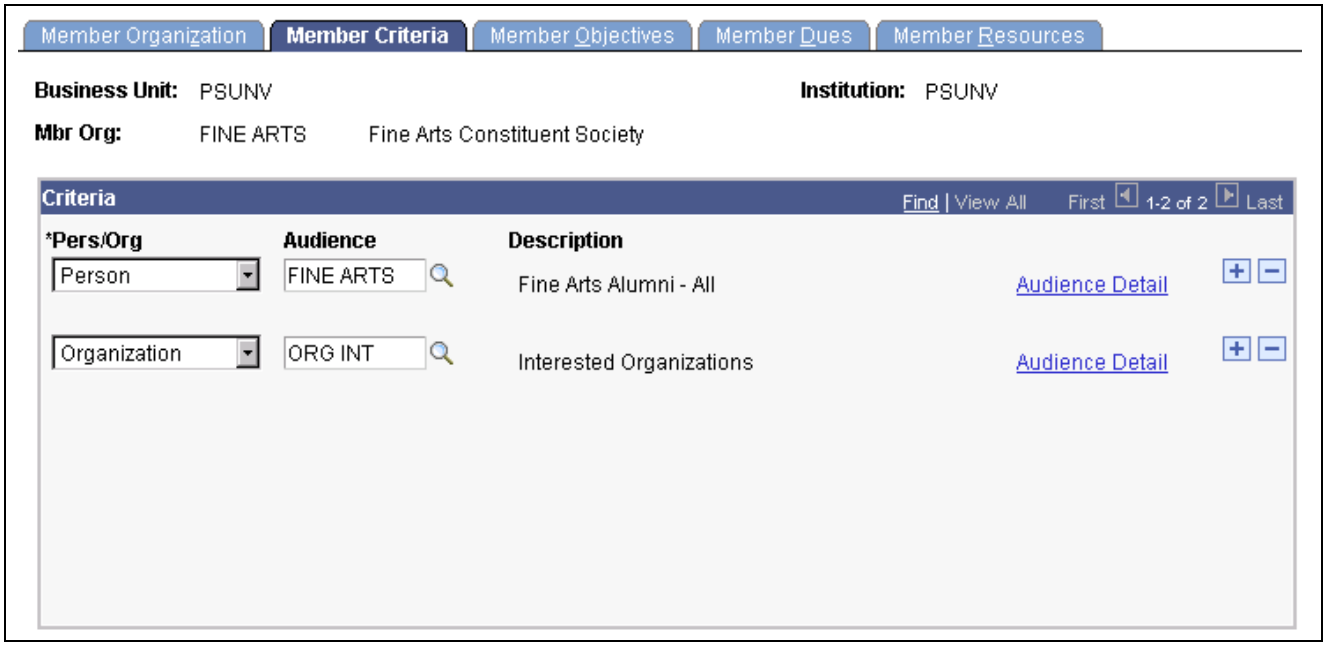
Membership Dues Required Select to require dues prior to a constituent's membership in the organization. If selected, at least one dues level on the Member Dues page must be completed for the member organization before the record can be saved. If cleared, you must select criteria on the Member Criteria 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 Criteria page

You must complete this page 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 option has been selected 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.

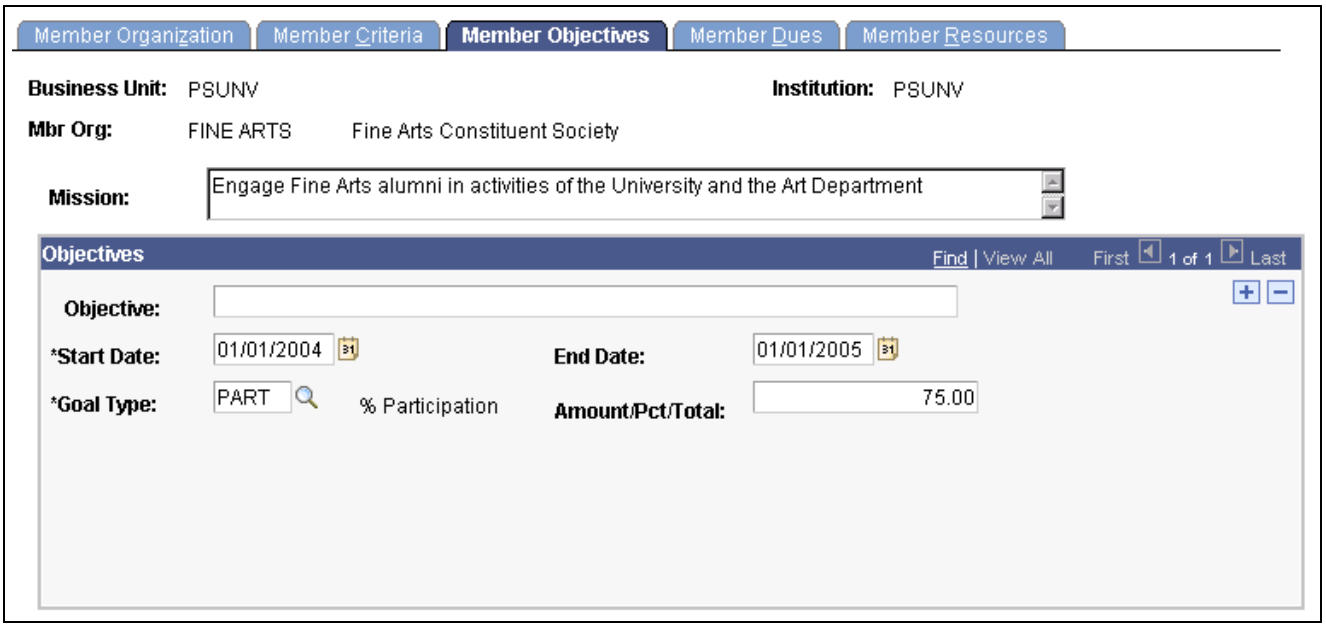
Audience Detail Click to view the selection criteria that have been defined for the audience code that you selected on the Audience Detail page.

See Also

Chapter 6, "Setting Up Initiatives," Setting Up Audience Criteria, page 53

Defining Membership Objectives

Access the Member Objectives page.



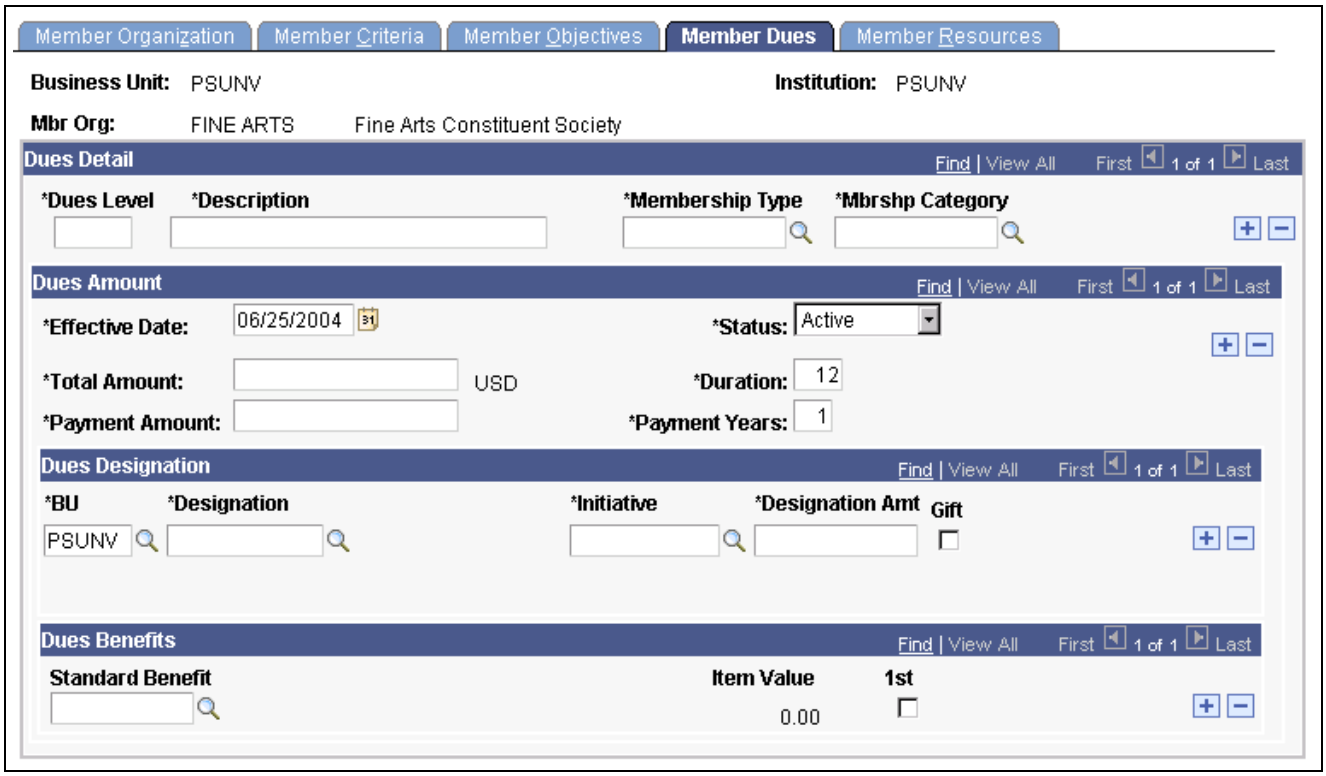
Member Objectives page

A member organization can have one or more objectives spanning various date ranges. These fields are intended to be used in reports.

Objective Enter an intended accomplishment for the member organization. Objectives can be up to 60 characters.

Defining Membership Dues

Access the Member Dues page.



Member Dues page

You must enter at least one row if the Membership Dues option is selected. If that option is cleared, you cannot enter data here; use the Member Criteria page instead.

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 that is defined by your institution. *Life* is a delivered value and should not be deleted. Use *Life* to designate any lifetime (non-expiring) membership.

The available values depend on the values that you set up on the Membership Type page for the setID that is associated with this member organization's business unit.

Mbrshp Category (membership category) — Indicate whether the dues apply to a *family, single person, couple,* or other value. You define values on the Membership page. The value that you indicate here appears during membership entry when a member organization is selected and a dues level is set.

The available values depend on the values that you set up on the Membership Category page for the setID that is associated with this member organization's business unit.

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,* the system ignores duration 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, enter the amount for each payment and the number of years that are required to reach the membership dues balance.

Dues Designation

BU (business unit)

Select the business unit to which the membership dues should be allocated. This prompt dialog box contains a list of all the valid business units at your institution. When you make a selection, the values in the Designation prompt dialog box change to display the values that you defined for this business unit's setID.

Note. If you have already selected a designation and then change the business unit, you must select a designation again.

Designation

Select the funds at your institution to which memberships and donations can be allocated.

The available values for each row include the designations that you defined for that business unit's setID.

Initiative

Select the membership or campaign initiative to which you want to assign member dues.

Designation Amt (designation amount)

Enter the amount or portion of the dues payment to be allocated to each designation.

Gift

When a portion of the dues is also a charitable contribution, select the designation that receives the contribution.

When you enter a membership and select the gift option, the member's giving records are updated with the portion of the dues that has been identified here as a charitable contribution.

Important! You must allocate exact portions of gift and non-gift monies of the total dues amount.

Dues Benefits

Standard Benefit and **Item Value**

Select any specific benefits of membership. For example, if a member receives a lapel pin when 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.

The available values depend on the values that you set up for the setID that is associated with this member organization's business unit. Items are defined on the Donor Appreciation Detail page.

1st

Select if a benefit is to be distributed to a member only once. This option indicates that when the member renews membership at the same level, the member does not receive the same benefit again.

Assigning Membership Resources

Access the Member Resources page.



Member Resources page

Responsible Mgr (responsible manager)

Select the responsible person's manager. The manager receives reports and notifications that are related to the member organization.

The responsible person is defined on the Member Organization page.

Department

Select the department that is 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 that is associated with a volunteer from the member organization. This selection enables you to associate the member organization to specific units 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 that 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.

Building and Merging Membership Lists

This section discusses how to:

- Build the member list.
- Merge the member list.

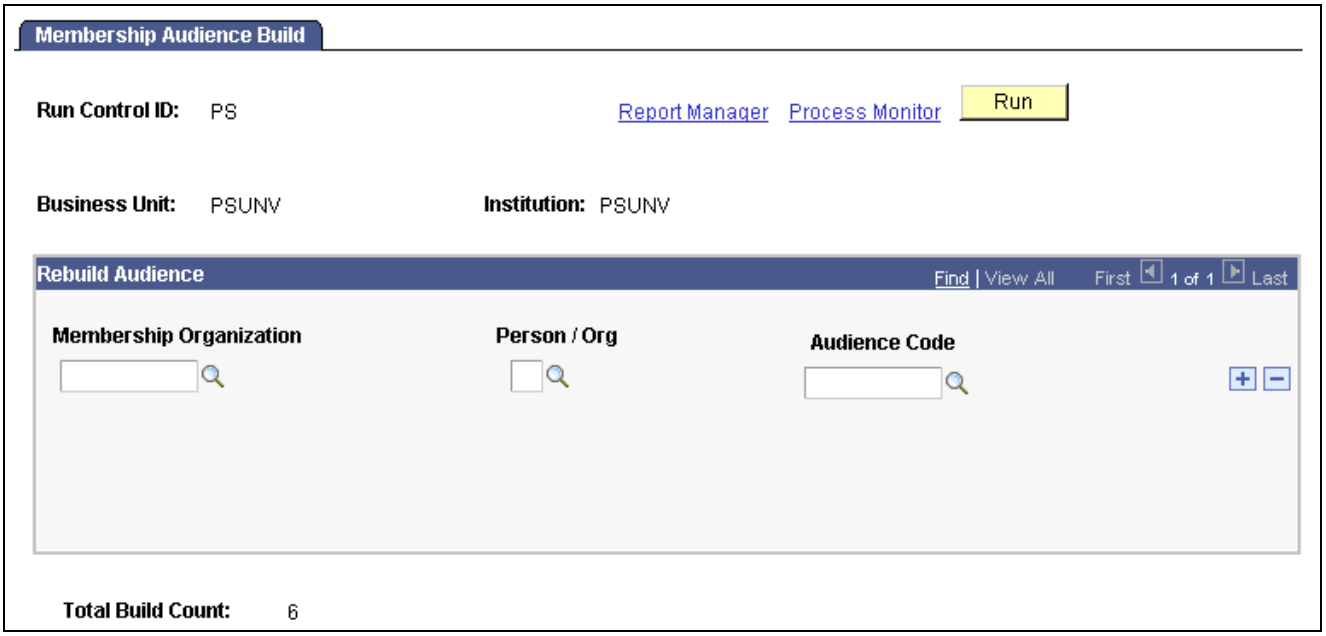
Note. In addition to running these processes, you can add constituents as complimentary members by entering the membership through a membership session.

Pages Used to Build and Merge Membership Lists

Page Name	Object Name	Navigation	Usage
Membership Audience Build	AV_RUNCTL_MBR	Contributor Relations, Membership Organizations, Manage Member Organizations, Build Membership Audience	Run the Membership Audience Build COBOL process (AVPMBR) that builds the list of members for a member organization.
Membership Audience Merge	AV_RUNCTL_MBR_MRG	Contributor Relations, Membership Organizations, Manage Member Organizations, Merge Membership Audience	Run the Membership Audience Merge COBOL process (AVPMMRG) 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 page

This process generates the actual list of members and stores it in a temporary table called AV_MBR_TEMP_TBL. When the records are in this table, they can be analyzed to determine if the member list is acceptable.

If you are building the audience for the first time, 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.

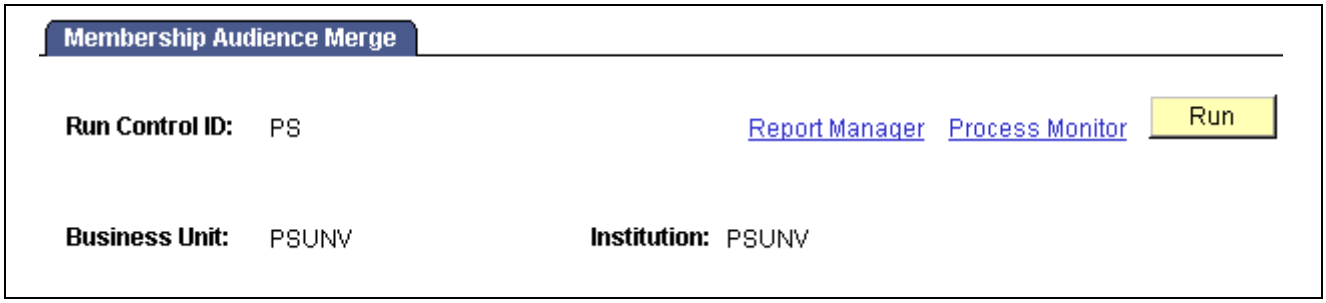
Membership Organization Select the membership organization to which the audience applies.

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 that you specify.

Note. The Total Build Count field must have a count of at least *1* before you run the Member Audience Build process.

Merging the Member List

Access the Membership Audience Merge page.



Membership Audience Merge page

The Membership Audience Merge process 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:

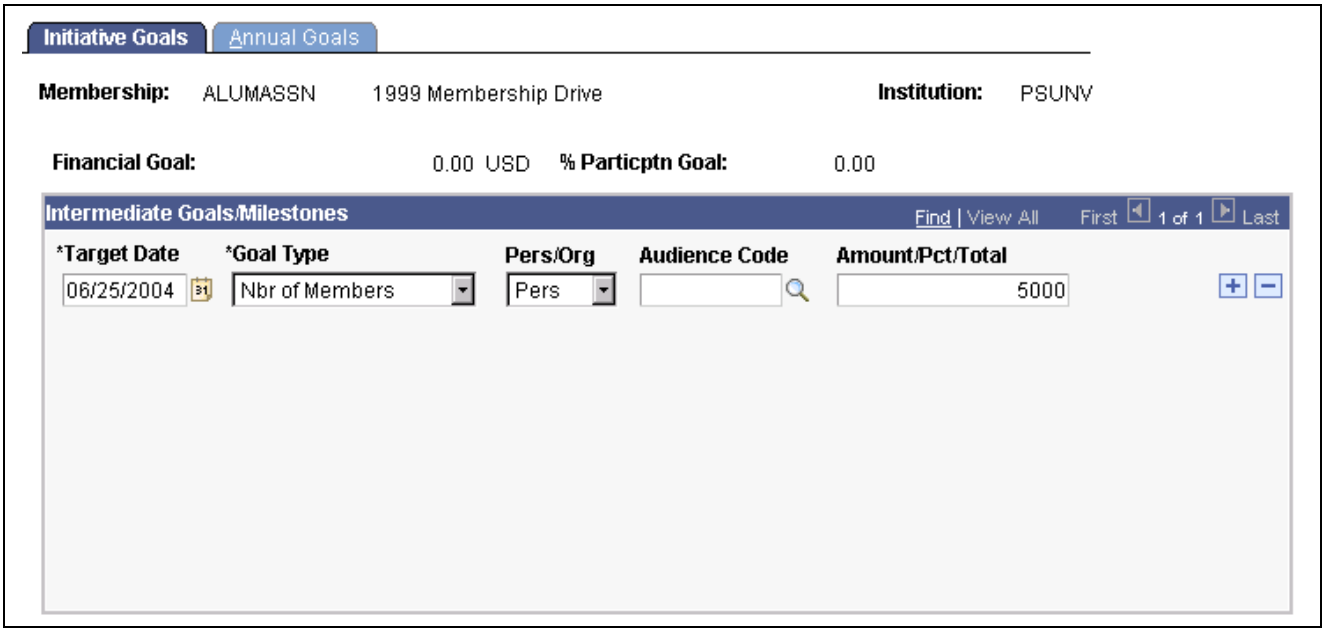
- Set intermediate goals for membership initiatives.
- Set annual goals for membership initiatives.

Pages Used to Define Membership Initiative Goals

Page Name	Object Name	Navigation	Usage
Initiative Goals	AV_INTV_MEMBR_GOAL	Contributor Relations, Initiatives, Membership Initiatives, Membership Goals, Initiative Goals	Set intermediate goals or milestones for an initiative.
Annual Goals	AV_MEMBR_ANNUAL	Contributor Relations, Initiatives, Membership Initiatives, Membership Goals, Annual Goals	Create annual or multiyear plans to increase the number of participating members for an organization.

Setting Intermediate Goals for Membership Initiatives

Access the Initiative Goals page.



Initiative Goals page

This page is used to set goals for the membership initiative, as opposed to the member organization.

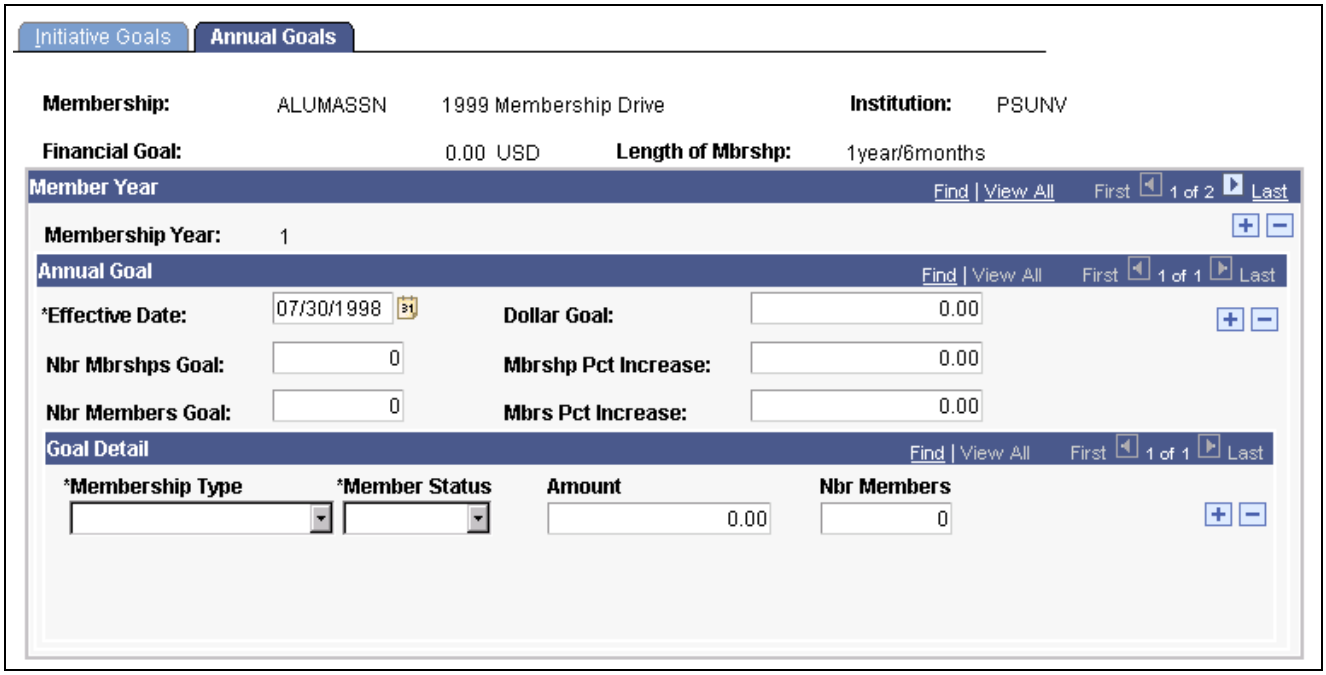
Target Date Select the date by which the goal may be reached. When you click the prompt button for this field, a calendar displays. Use the arrow keys at the bottom of the calendar to locate the appropriate month and year, and then click the specific date.

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.



Annual Goals page

Use this page 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 that is 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.

Goal Detail

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 *Annual, Sustaining, Life,* and so on. The valid membership types are determined by the setID that is associated with the selected initiative's business unit.

Member Status — Select the status of the members from which memberships are received, such as *New, Lapsed, Renewed,* and so on. These values are defined by your institution.

Amount and **Nbr Members** (number of members) Enter the monetary goal and the goal for the number of members.

Entering Member Dues

This section provides overviews of membership dues and gift processing in membership sessions, lists common elements, and discusses how to:

- Enter dues payment detail.
- Enter check or credit card information.
- Assign membership designations and associate others with a membership.

Understanding Membership Dues

When you enter membership dues, you open a membership session by using the Maintain Sessions page. This page is similar to the page that you use to open gift or pledge sessions, and the process is identical, with one exception. When you open a membership or adjust a 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 the constituent a complimentary association membership.

If you plan to enter complimentary memberships within the session, indicate the number of complimentary membership transactions that you plan to enter in the Expt Cnt (expected count) field for this row. For regular membership dues transactions, add a row and complete the Tender Type, Expt Cnt, and Expt Amt (expected amount) fields. Because complimentary memberships are entered through a membership session, your institution can track which users are granting memberships to constituents.

After you establish a session, enter dues by 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 the system.

After you enter a membership session, you must balance and queue the session for posting.

See Also

Chapter 17, "Entering Commitments," Creating and Working with Sessions, page 327

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 understand 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. 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 1,000 USD for a lifetime membership at your institution. 750 USD of the payment is non-gift dues and 250 USD is a gift. After this transaction is processed, the Membership History page displays a lifetime dues payment of 1,000 USD. The Transaction Register page displays a gift of 250 USD with a hard credit to Mr. Jones.

In another example, Mr. Jones writes a membership check for 1,000 USD to your institution for a joint lifetime membership for Mrs. Jones and himself. 750 USD of the payment is non-gift dues and 250 USD is a gift. After the transaction is processed, the Membership History page displays a lifetime dues payment of 1,000 USD for both Mr. Jones and Mrs. Jones. The Transaction Register page displays a gift of 250 USD with a hard credit to Mr. Jones, and a gift of 250 USD 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 1,000 USD 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

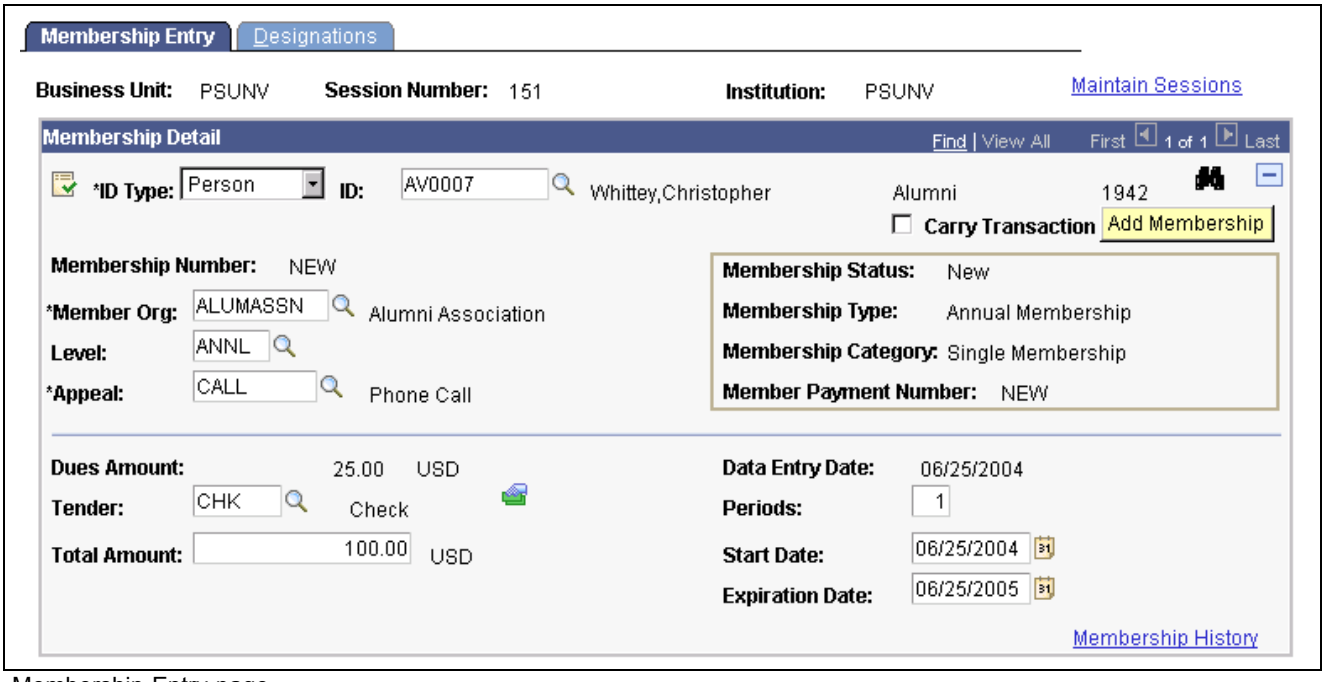
Maintain Sessions Click when you have finished entering transactions in a session. The system displays the Maintain Membership Sessions page, which enables you to balance the session.

Pages Used to Enter Member Dues

Page Name	Object Name	Navigation	Usage
Membership Entry	AV_MBR_ENTRY	• Contributor Relations, Session Management, Enter Memberships, Membership Entry • Click the Session Entry link on the Maintain Membership Sessions page.	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	• Contributor Relations, Session Management, Enter Memberships, Membership Entry, Designations • Click the Session Entry link on the Maintain Membership Sessions page (for adjustment sessions).	Apply payments to designations or allocation accounts at your institution.

Entering Dues Payment Detail

Access the Membership Entry page.



Membership Entry page

When you open a new session, this is the first page that appears. This page contains information about the appeal, dues level, amount, tender type, and so on.

If the currency code that you selected for this session on the Maintain Session page differs from the 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.

Because 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, and then click the Update Record button.

If you have not entered a donor's ID, you are 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 that you are adding a new member and displays the pages for adding or updating a new constituent.

Year

If the member is an alumnus or alumna, the preferred class year appears.



Click to access the CR Search page, where you can search for a member.

See Chapter 8, "Managing Constituent Data," Searching for People, page 123.

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 appears by default in 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.

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 system displays the existing membership number for the selected member organization. If not, the system assigns a new membership number.

Note. New membership numbers are assigned based on the last membership number on the CR Installation page.

Member Org (member organization)

Select the member organization that the member is joining. The available values for this field include 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 Level field is populated by default with the last dues level for the member, 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.

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 that 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 fields) and resets the exchange rate based on the data entry date when you edit this field. The system also recalculates designation information. If you enter 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 available values include the appeals that you defined for the setID that is associated with the session's business unit.

Complimentary

If the membership organization that you selected is set up on the Member Organization page to allow complimentary memberships, this check box appears. Select to grant complimentary membership to the constituent or allow memberships with no payment. You can cancel complimentary memberships on the Member Adjust page.

If you select this check box, the system hides the Dues Amt, Tender, and Total Amt fields. Additionally, you cannot edit any information on the Designations page.

Membership Status

This field populates based on the information that the system retrieves when you select a member organization. Values are:

New: No previous membership exists for the selected member organization.

Renewed: A membership exists for the selected member organization. The membership has an expiration date that is equal to or greater than the system date, or, for organizations whose expiration dates occur on the same day every year, the expiration date falls within the span of days specified in the Membership Days field on the Institution Installation page.

Reactivated: A membership exists for the selected member organization. The membership's expiration date is less than the system date, minus the number of days specified in the Membership Days field on the Institution Installation page.

Membership Type and **Membership Category**

These fields display after you enter payment information. The information in these fields is based on dues level.

Member Payment Number This field populates by default to *NEW* when you enter a new membership payment. After you save the membership session, the system assigns a number 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. The dues amount is the amount of money that 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.

Tender Select a monetary form in which the payment is received. Examples are *Cash, Credit Card, Check,* and so on.

The available values depend on the values that you set up on the Tender Types page for the business unit's setID.



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 17, "Entering Commitments," Entering Check or Credit Card Information, page 339.

Periods Enter the number of periods for which the member wants to pay membership dues. The system adjusts the total amount of the dues based on the number of periods that you select.

Note. If you enter a partial dues payment with a total amount that is less than the expected amount for the level, the system automatically calculates the new prorated period value and makes the Periods field display-only.

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.

You can capture under- and overpayments in this field, to record partial membership payments or installment payments. Be sure that the membership payment amount in this field matches the Amount field on the Designations page. If you enter an underpayment, a warning message appears that the total amount does not match the dues amount. However, you can still save the page, and the system records the payment as a partial payment.

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 system converts the dues amount based on the updated exchange rate and recalculates designation information. If you enter additional transactions in this session and change the exchange rate, you must reenter those transactions.

Expiration Date

The expiration date for membership appears. The system calculates this field based on the length of membership at various levels, as defined on the Member Dues page, multiplied by the periods. You can edit this field.

The system uses a different calculation, based on membership status:

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 13, "Managing Membership," Viewing Membership History, page 300.

Entering Check or Credit Card Information

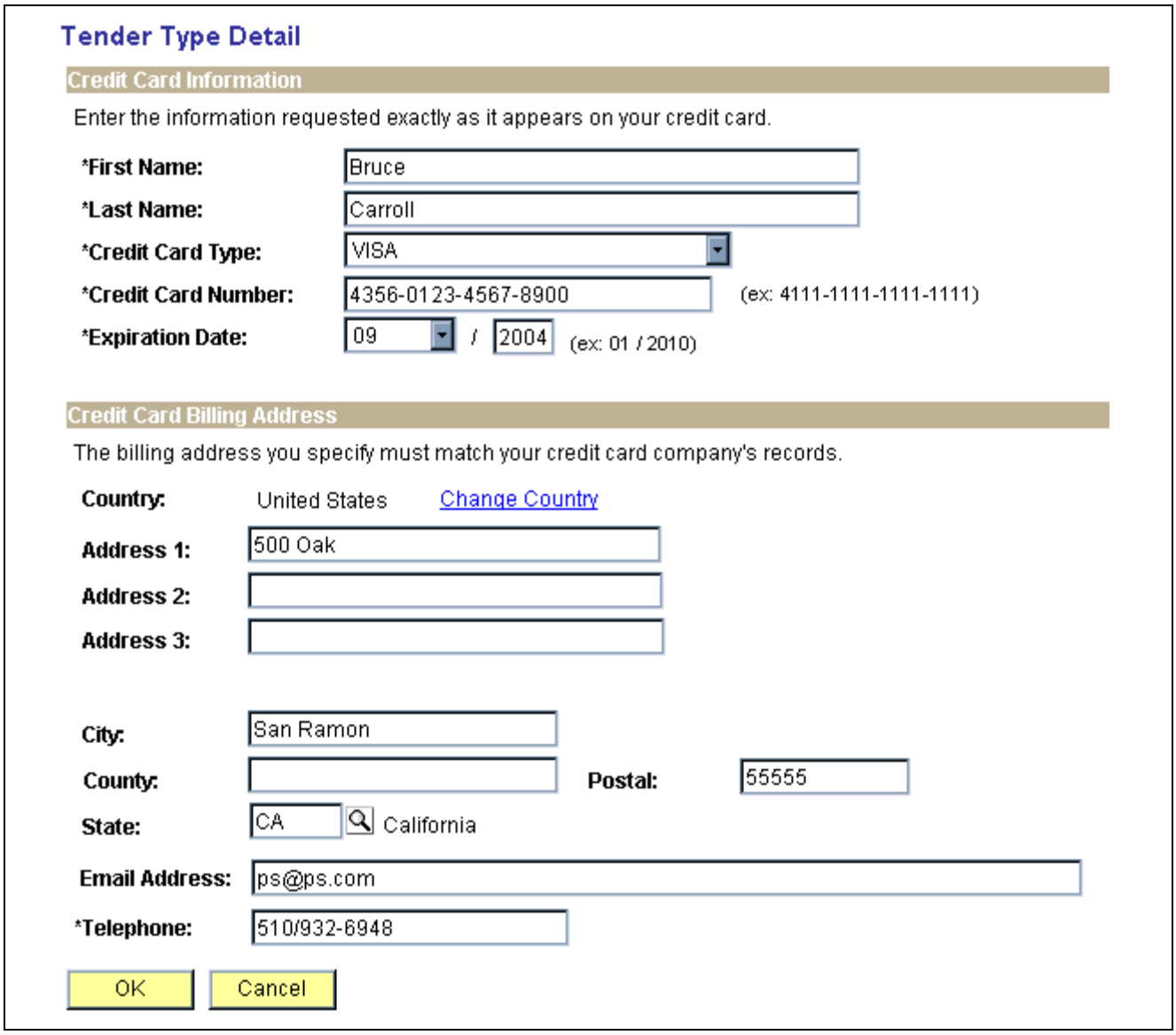
Access the Tender Type Detail page. The system displays different fields based on whether you entered *CHK* or *CC* as the tender on the Membership Entry page.



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 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. or 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 that the credit card holder is using. These values are set up on the Credit Card Type page.

See Chapter 7, "Setting Up Commitment Management," Defining Credit Card Types, page 106.

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 they appear 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 that you define on the CR Merchants page.

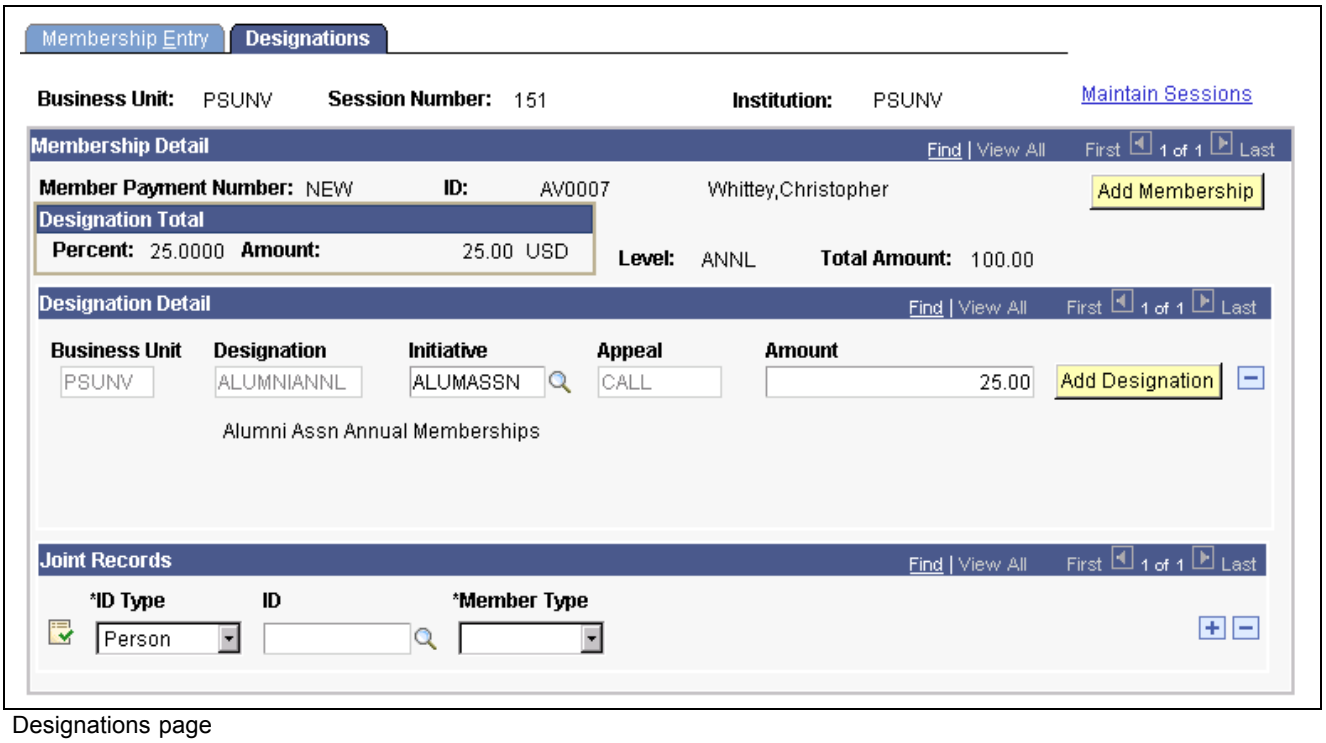
OK Click to validate any changed information, save, and close the page.

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 0 USD), 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.



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 access 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 with the business unit that you selected when setting up the dues level for the organization and cannot be changed.

If you are adding a new designation row, valid values are all business units at your institution to which security access has been granted. When you make a selection, the available values in the designation and appeal fields change to those values that you defined for the business unit's setID.

If you have already selected a designation and appeal, and then change the business unit, you must select a designation and appeal again.

Designation

The designations that 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 available values are those designations that you defined for the business unit's setID.

Initiative

Select an initiative from the prompt dialog box, which contains all the current campaign and membership initiatives defined at the institutions to which you have security. The system displays the default initiative that you defined for the member organization on the Membership Dues page, but you can change this value.

Appeal

The appeal that you chose on the Membership Entry page is used for all designation entries 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 available values include the appeals that you defined for the business unit's setID.

Amount

Enter the payment to allocate to this designation. The dues amount that 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.

Joint Records



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.

Because 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, and then click the Update Record button.

If you have not entered a member's ID, you are 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 that you are adding a new member and displays the pages for adding or updating a new constituent.

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 reports.

See Also

Chapter 2, "Setting Up Your Contributor Relations Framework," Setting Up Institution Defaults, page 7

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 18, "Processing Commitments," Processing Credit Card Transactions, page 389.

Adjusting Membership Dues Payments

This section provides an overview of membership dues payments and discusses how to:

- Select posted dues transactions to be adjusted.
- Adjust dues payment details.
- Adjust designation and associated constituent information.

Understanding Membership Dues Payment Adjustments

When you adjust membership dues, you open a session, just as you would to adjust gifts or pledges. When 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.

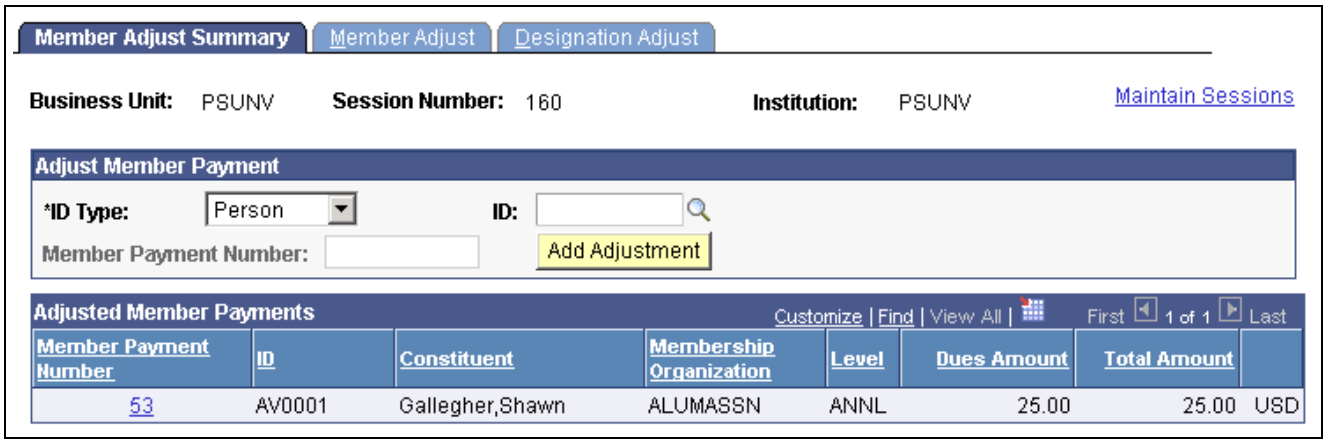
Note. Adjusted transactions negate the original transaction and create a new transaction record, so you enter adjustment amounts just as you would if entering the correct original transaction.

Pages Used to Adjust Membership Dues Payments

Page Name	Object Name	Navigation	Usage
Member Adjust Summary	AV_ADJ_MBR_SMRY	Contributor Relations, Session Management, Enter Memberships, Membership Adjustment, Member Adjust Summary	Select the membership transactions to adjust in this adjustment session.
Member Adjust	AV_ADJ_MBR	Contributor Relations, Session Management, Enter Memberships, Membership Adjustment, Member Adjust	Make adjustments to an existing membership transaction that you selected on the Membership Adjustment Summary page.
Designation Adjust	AV_MBR_ENTRY2	Contributor Relations, Session Management, Enter Memberships, Membership Adjustment, Designation Adjust	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 page

Member Payment Number Enter the original number for the transaction to adjust. Available values include the existing posted membership payments for the ID that you select.

Note. You must enter an ID before selecting a membership payment number.

Note. You can further narrow the search by entering a member organization code and data entry date in the prompt dialog box. When you enter a member organization code, the system displays the existing dues transactions for the member organization that you select. When you enter a data entry date, the system displays the transactions entered on or after the date that you enter.

Add Adjustment Click to display the Membership Adjustment page, where you can change transaction information.

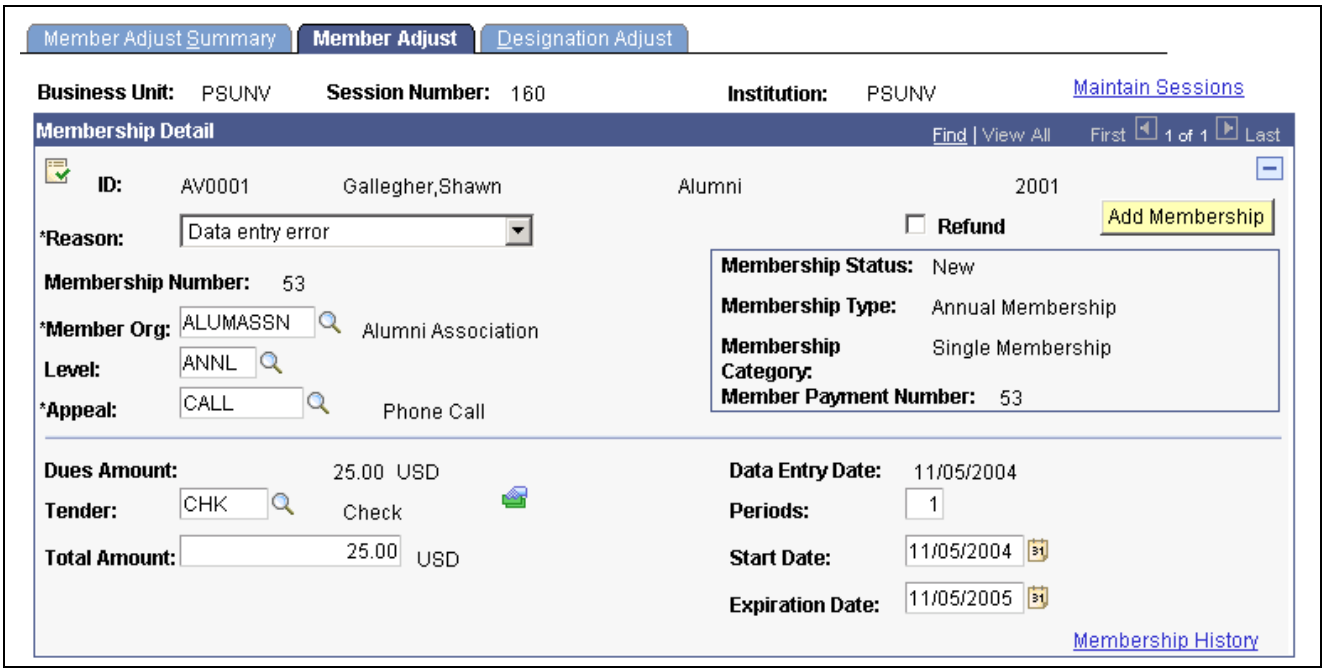
Important! The original transaction must be posted before you can adjust it. If a transaction does not appear in the Mbr Pmt Nbr field, it is likely part of an unposted session. If the session has not been queued, you can change the membership in the original session by reopening the session, if balanced.

Adjusted Member Payments

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.



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. You selected this value 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 a transaction does not appear in the Mbr Pmt Nbr field, 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.

Canceling a Membership

To cancel a membership:

1. Select an adjustment reason.
2. (Optional) Select the Refund check box.
3. Change the dues total amount to *0.00*.
4. Enter an expiration date for the membership.
5. Make any other adjustments to field values as necessary.
6. Click Save.

The system processes the adjustment as follows:

1. The system confirms that the membership is not complimentary.
2. The system searches for the last non-zero adjusted membership payment, or the last zero-amount complimentary membership payment, and designates that last payment as the current membership.

   If the system does not find any membership payment, it deletes the membership record on the AV_MEMBERSHIP table. Member detail and adjusted member detail records remain for audit purposes.
3. The system performs these processing steps not only for the member but also for all joint memberships that are affected by the adjustment.

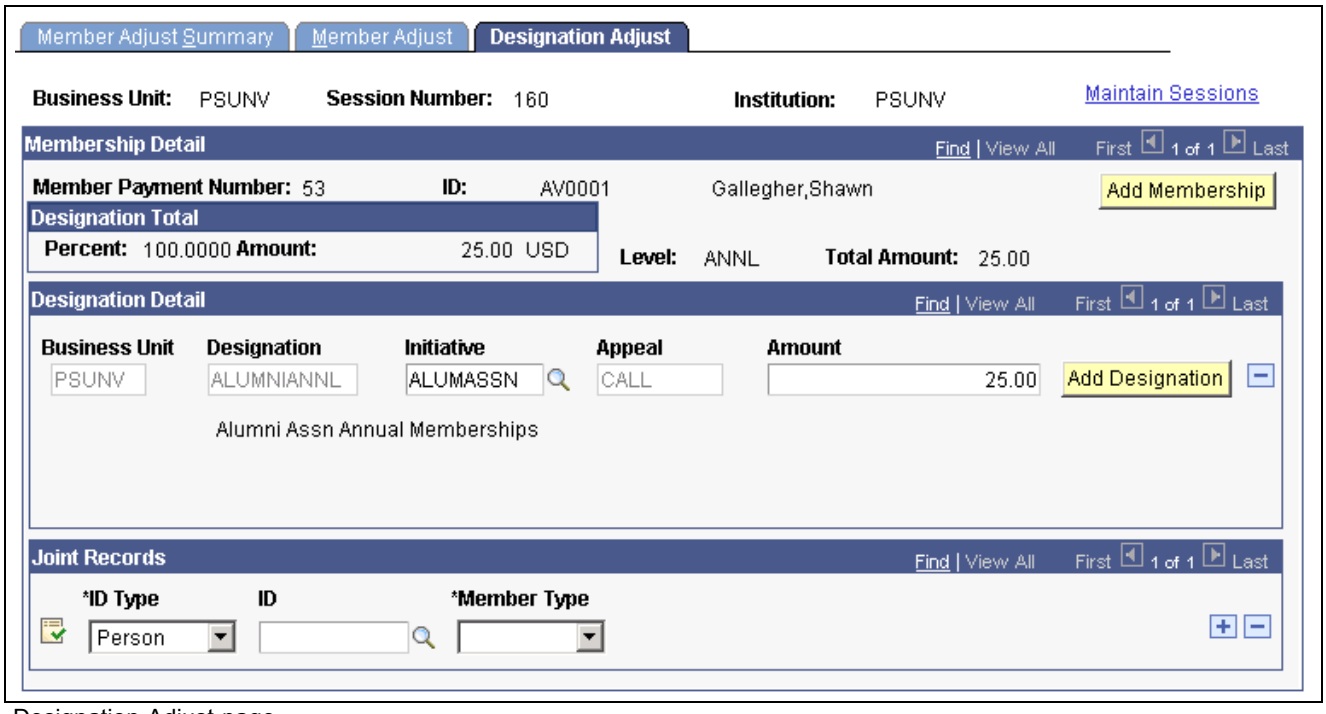
When you cancel a membership, it no longer appears in the constituent's membership history. The system does not display adjusted or deleted memberships.

See Also

Chapter 13, "Managing Membership," Entering Dues Payment Detail, page 285

Adjusting Designation and Associated Constituent Information

Access the Designation Adjust page.



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. You select the people or organizations associated with the membership in these capacities.

When you access 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 percent 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 100 USD, and the constituent donated 100 USD in addition to the dues amount, the percentage is 50 until you allocate the extra 100 USD 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, the system populates this field by default with the business unit that you selected for the session; the value cannot be changed.

If you are adjusting the designation row, the available values are all business units at your institution to which security access has been granted. When you make a selection, the values in the Designation and Appeal fields change to display the values that you defined for the business unit's setID.

If you have already selected a designation and appeal, and then change the business unit, your selections are backed out.

Designation

The designations that 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 that you are adjusting, you can edit this field. You can select additional designations or make changes to the designations for the gift portion of the transaction.

If you select a new designation, the available values are the designations that you defined for the business unit's setID.

Initiative

You can make changes to this field. The available values include all the current campaign and membership initiatives defined at the institutions to which you have security. The system displays the default initiative that you defined for the member organization on the Membership Dues page, but you can edit this value.

Appeal The appeal that 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 that you are adjusting, you can edit this field. You can select additional appeals or make changes to the appeals for the gift portion of the transaction.

If you select a new appeal, the available values include the appeals that you defined for the business unit's setID.

Amount If your institution allows the entry of gifts in membership sessions, and there are gifts included in the transaction that you are editing, you can edit this field.

The system displays the dues amount that you entered on the Membership Dues page for the member organization, but you can edit it 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 18, "Processing Commitments," Processing and Posting Sessions, page 381

Chapter 13, "Managing Membership," Assigning Membership Designations and Associating Others with a Membership, page 291

Preparing for Membership Letters

The PeopleSoft system provides two mass change templates that enable you to generate communications specifically for membership organization members. Use these templates, along with the Audience Criteria and Defaults and run the 3C Engine with the Mass Change pages to generate communications for a membership audience.

In the 3C Engine component (Campus Community, 3C Engine, Run 3C Engine) you can choose to process both the trigger and mass change at the same time on the Trigger Table page. Then, select a mass change group ID on the Mass Change page. You also have the option to edit the mass change definitions.

Note. By selecting the *Both* option on the Trigger Table page, the system runs the mass change and also uses the trigger created to write the communication record.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Using the 3C Engine," Running the 3C Engine Process

Chapter 11, "Managing Initiatives," Understanding the Membership Mass Change Template, page 253

Viewing Membership Progress

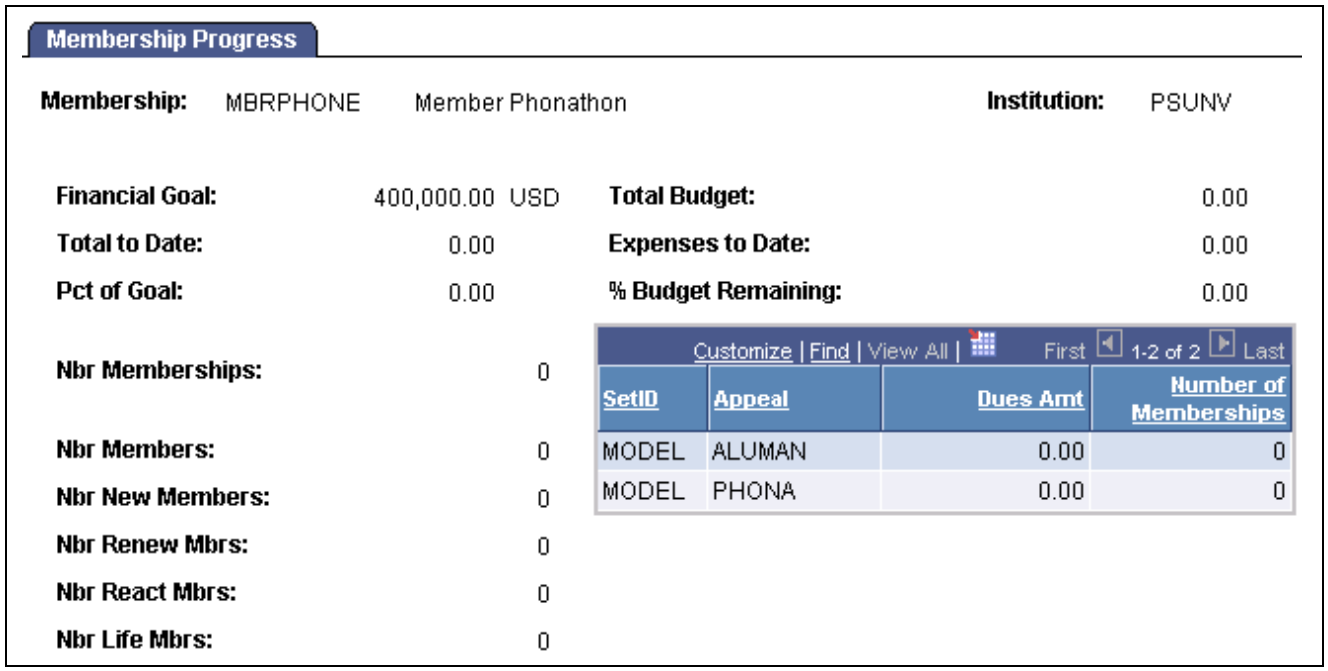
This section discusses how to view membership progress.

Page Used to View Membership Progress

Page Name	Object Name	Navigation	Usage
Membership Progress	AV_MEMBR_PROGRESS	Contributor Relations, Initiatives, Membership Initiatives, Membership Initiative Progress	View aggregated information of a membership initiative.

Viewing Membership Progress

Access the Membership Progress page.



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 that were sent in relation to this membership initiative. For each appeal, you can view the dues amount received and the 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	• Contributor Relations, Member Organizations, Membership History, Membership History • Contributor Relations, Member Organizations, Membership History, Membership History − Org • Contributor Relations, Member Organizations, Membership History, Membership History - Workset	View information about a 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	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 13, "Managing Membership," Entering Dues Payment Detail, page 285

Chapter 13, "Managing Membership," Assigning Membership Designations and Associating Others with a Membership, page 291

Viewing Membership Benefit History

This section discusses how to view membership benefit history. When you enter a membership through a session, the system enters benefits that have been earned by joining at a particular dues level.

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	• Contributor Relations, Member Organizations, Membership Benefit Summary, View Member Benefits • Contributor Relations, Member Organizations, Membership Benefit Summary, View Member Benefits - Org • Contributor Relations, Member Organizations, Membership Benefit Summary, View Member Benefits - Workset	View a summary of the benefits that a member has earned.

Viewing a Membership Summary or a Supervisor's Membership Summary

This section discusses how to view membership summary information.

Page Used to View a Membership Summary or a Supervisor's Membership Summary

Page Name	Object Name	Navigation	Usage
Membership Summary, Supervisor Membership Summary	AV_MBRSHP_SMRY	• Contributor Relations, Session Management, Supervise Sessions, Membership Sessions, Membership Session Summary • Contributor Relations, Session Management, Supervise Sessions, Membership Sessions, 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 that you selected.

If the membership session that 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 13, “Managing Membership,” Entering Dues Payment Detail, page 285

CHAPTER 14

Managing Volunteers

This chapter provides an overview of volunteer management and discusses how to:

- Manage general initiative information.
- Assign volunteers to roles.
- Assign volunteers to specific tasks.
- Create a biographical bit or brief.
- Review volunteer history.
- Review volunteer audience history.

See Also

Chapter 6, "Setting Up Initiatives," Setting Up Volunteer Efforts, page 67

Understanding Volunteer Management

This section lists prerequisites and discusses volunteer management.

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 45.

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 Contributor Relations Framework," Adding Resources, page 11.

Volunteer Management

When 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 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 11, “Managing Initiatives,” page 227

Managing General Initiative Information

You manage volunteer efforts in 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 11, “Managing Initiatives,” page 227.

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

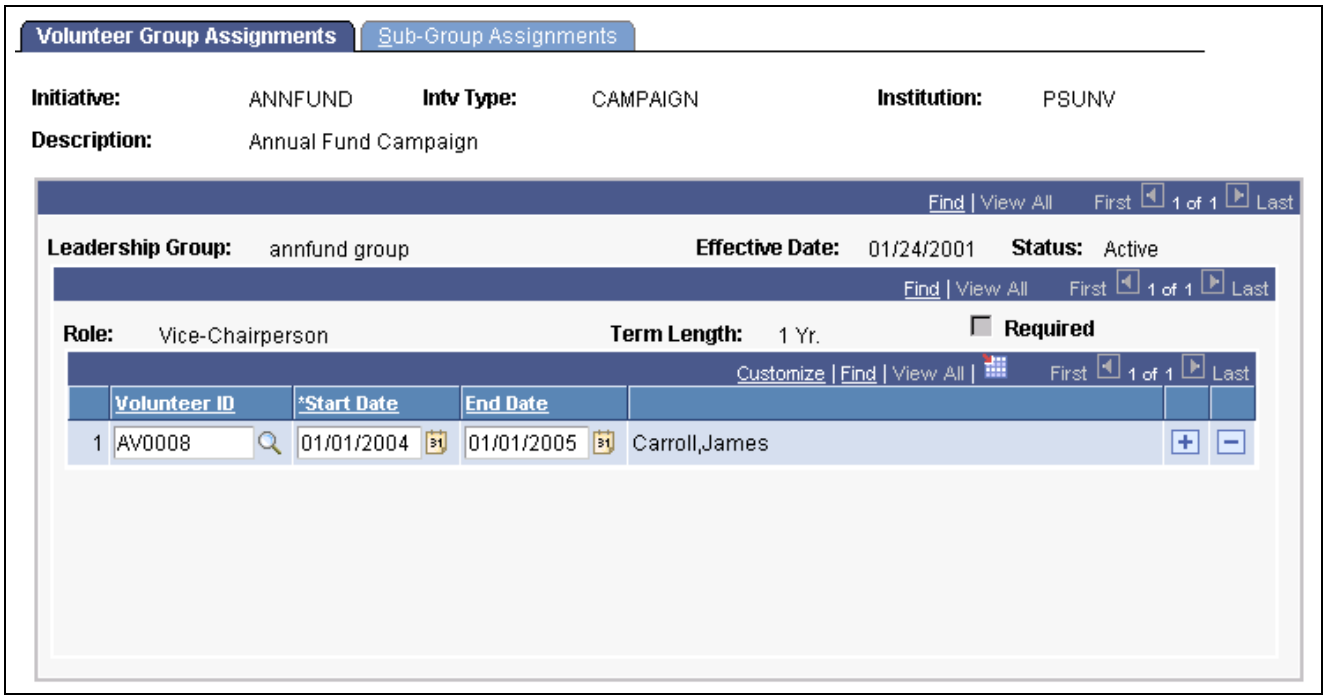
Chapter 14, “Managing Volunteers,” Assigning Volunteers to Specific Tasks, page 309

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	• Contributor Relations, Initiatives, Volunteer Initiatives, Initiative Leadership, Volunteer Group Assignments • Contributor Relations, Initiatives, Volunteer Initiatives, Membership Org Volunteers, Member Organization Leadership, 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	• Contributor Relations, Initiatives, Volunteer Initiatives, Initiative Leadership, Sub-Group Assignments • Contributor Relations, Initiatives, Volunteer Initiatives, Membership Org Volunteers, Member Organization Leadership, 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.



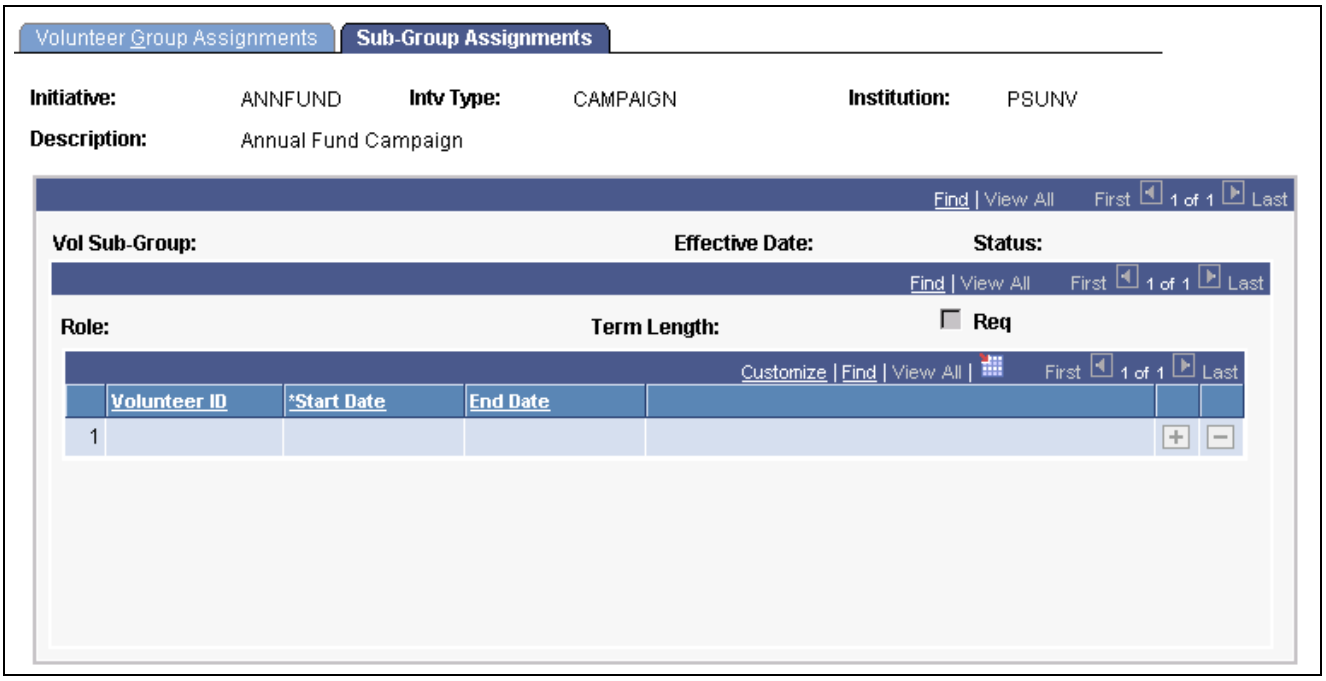
Volunteer Group Assignments page

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 14, “Managing Volunteers,” Assigning Volunteers to Roles, page 306

Prerequisites

Before you can assign volunteers to projects, you must:

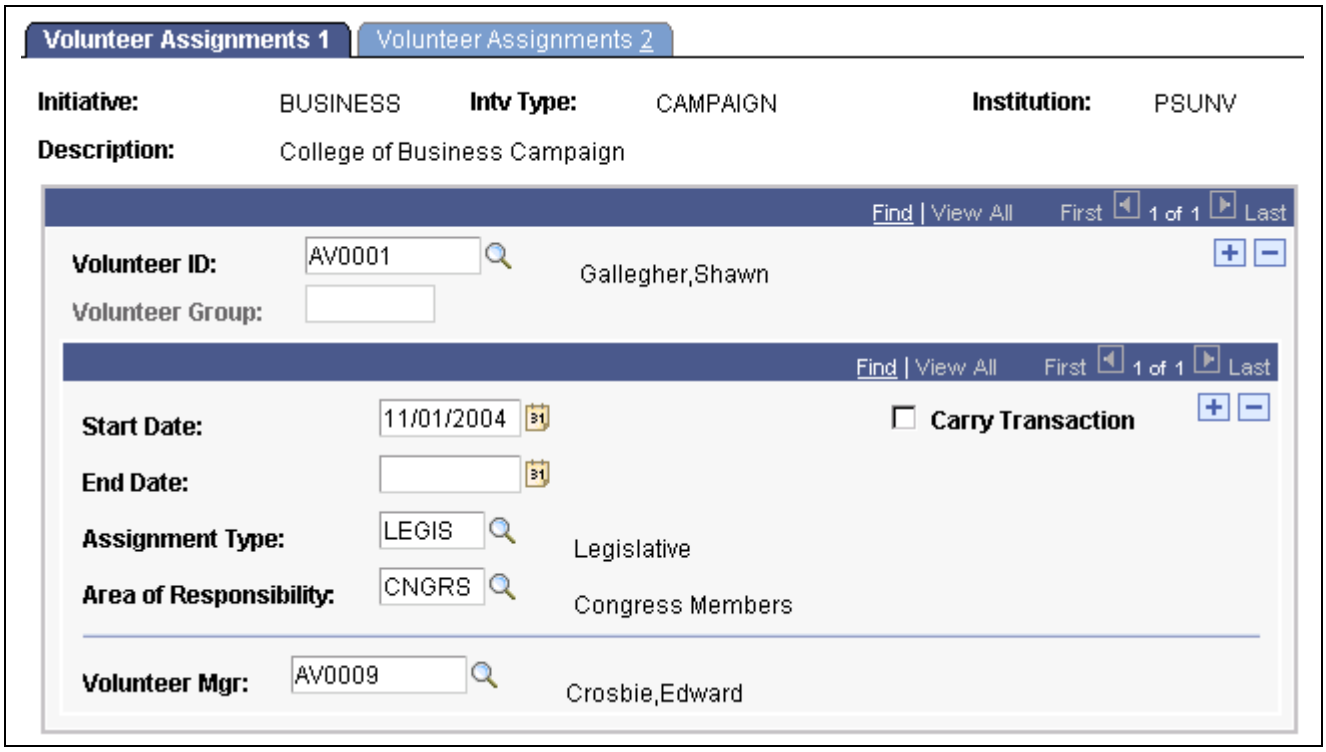
- Define assignment types on the Assignment Type page.
- Define a volunteer initiative on the Volunteers page.
- Set up contact types on the Contact Types page.

Pages Used to Assign Volunteers to Specific Tasks

Page Name	Object Name	Navigation	Usage
Volunteer Assignments 1	AV_VOL_ASGN1, AV_VOL_ASGN1_M	Contributor Relations, Initiatives, Volunteer Initiatives, Initiative Volunteers, Volunteer 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	Contributor Relations, Initiatives, Volunteer Initiatives, Initiative Volunteers, Volunteer 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 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 the system, but your institution can define additional values.

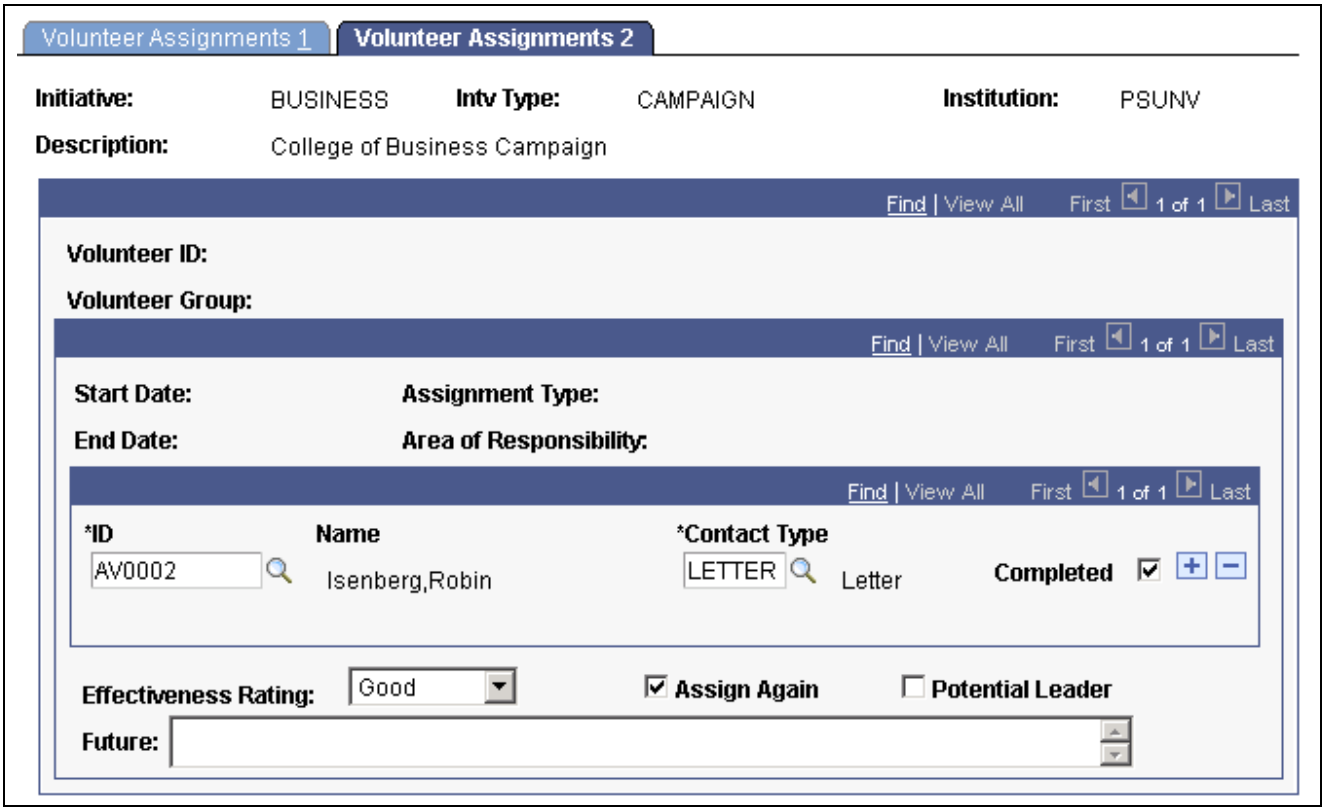
Area of Responsibility Enter the area of responsibility for the individual or group that you are assigning. Areas of responsibility describe the sphere of accountability for the assignment type that you selected. Values for this field are defined by your institution on the Area of Responsibility page.

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 2 page

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 Biographical 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 9, "Managing Prospects," Tracking Prospect Data, page 176

Appendix C, "PeopleSoft Contributor Relations Reports," Contributor Relations Reports: Selected Reports, page 518

Reviewing Volunteer History

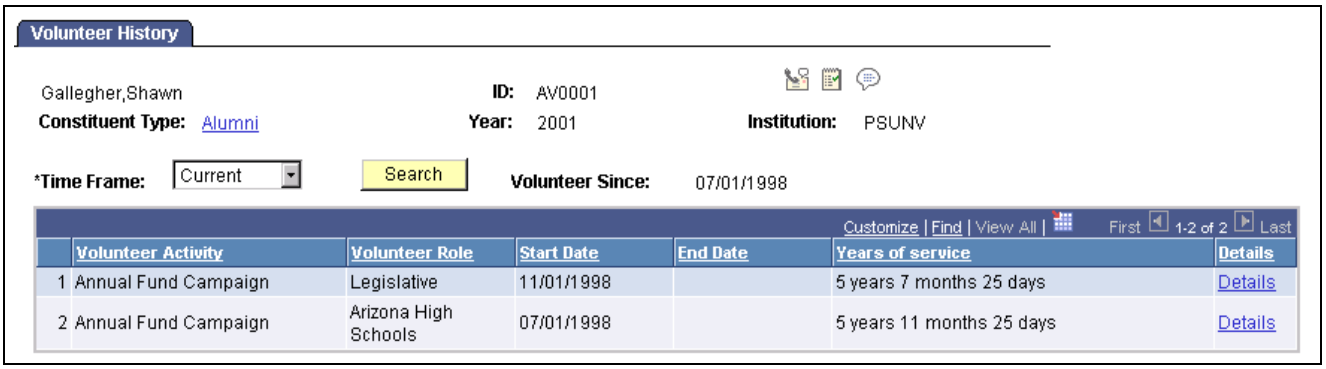
This section discusses how to review volunteer history information.

Pages Used to View Volunteer History

Page Name	Object Name	Navigation	Usage
Volunteer History	AV_VOL_HIST, AV_VOL_HIST_W	• Contributor Relations, Initiatives, Volunteer Initiatives, Volunteer History • Contributor Relations, Constituent Information, Workset, Volunteer History	Review information about a particular volunteer's past involvement at your institution.
Volunteer Assignment Detail	AV_VOL_ASGN_SP	Click the Details link on the Volunteer History inquiry page.	Review detailed information about a volunteer's activity.
Audience History	AV_AUD_HISTORY	Contributor Relations, Constituent Information, People, Participation, 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 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.

Reviewing 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 8, "Managing Constituent Data," Viewing a Constituent's Audience History, page 150

CHAPTER 15

Managing Event Initiatives

This chapter provides an overview of event initiative management and discusses 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 6, "Setting Up Initiatives," Setting Up Event Initiatives, page 74

Understanding Event Initiative Management

This section lists prerequisites and discusses event initiative management.

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 45.

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. Contributor Relations provides the capability to effectively plan, manage, and track these events.

Contributor Relations Event Management functionality interfaces with the Event Management functions found in PeopleSoft Enterprise Campus 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 Campus Solutions system.

In addition to the functionality provided through Campus Solutions, Contributor Relations provides the tools to define an event's structure or planning path.

An event initiative is one type of initiative in 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 11, "Managing Initiatives," page 227

Managing General Initiative Information

You manage events in 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.

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 11, "Managing Initiatives," page 227.

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 audience criteria and defaults, and run the 3C Engine with the Mass Change pages to generate communications for an initiative audience.

You can use a one-stop approach in the 3C Engine component (Campus Community, 3C Engine, Run 3C Engine). Choose to process *Both* the trigger and mass change at the same time on the Trigger Table page. Then, select a Mass Change Group ID on the Mass Change page. You also have the option to edit the mass change definitions.

Note. By selecting the *Both* option on the Trigger Table page, the system runs the mass change and also uses the trigger created to write the communication record.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Using the 3C Engine," Running the 3C Engine Process

Chapter 11, "Managing Initiatives," Understanding the Initiative Mass Change Template, page 252

Setting Intermediate Goals for Events

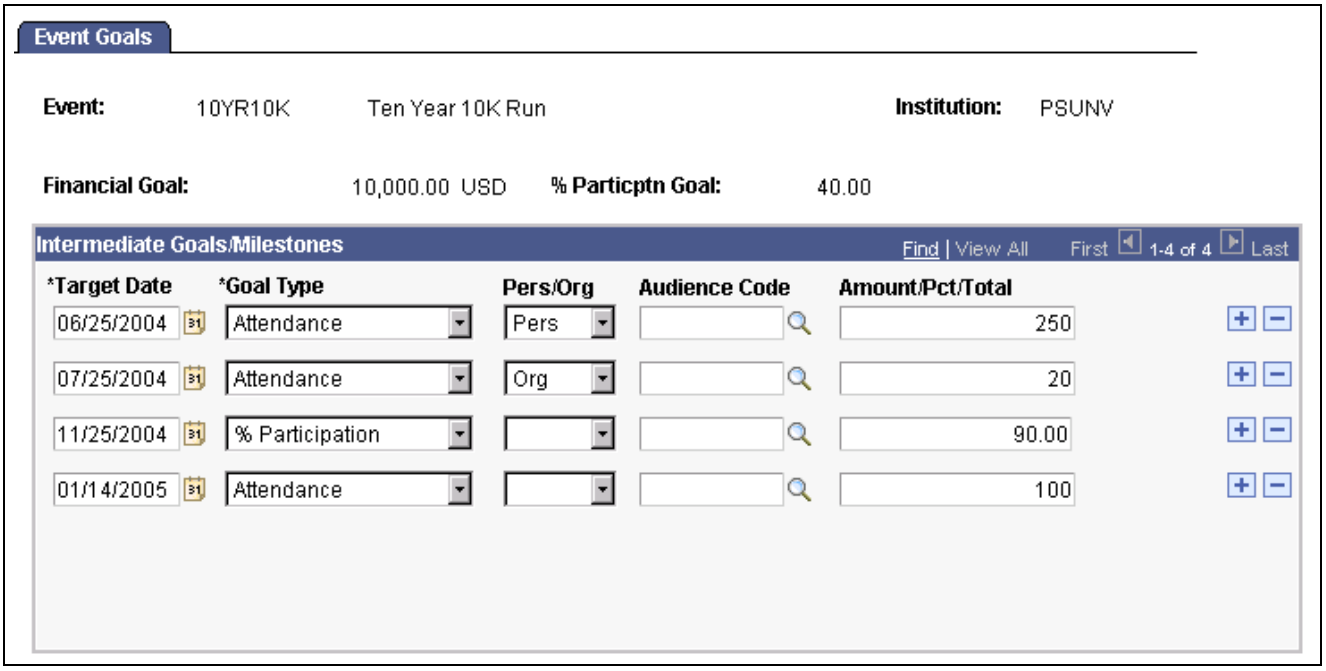
This section discusses how to set goals or milestones for an event.

Page Used to Set Intermediate Goals for Events

Page Name	Object Name	Navigation	Usage
Event Goals	AV_INTV_EVNT_GOAL	Contributor Relations, Initiatives, Event Initiatives, Manage Event Initiatives, Event Goals	Set intermediate goals or milestones for an event.

Setting Event Goals

Access the Event Goals page.



Event Goals page

Upon entering this page, the Financial Goal and % Particptn 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 *% Income, Financial, % Participation, Number of Donors,* and *Number of Volunteers.* Your institution can define additional goal types.
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 *Segmentation* 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 Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Setting Up Campus Event Planning"

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Campus Event Planning," Creating an Event

Assigning Meeting Details

After 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 Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Campus Event Planning," 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 Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Campus Event Planning," 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 Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Setting Up Campus Event Planning," Creating an Event Template

Reviewing Events, Meetings, and Attendees

After 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 Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Campus Event Planning," 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 11, “Managing Initiatives,” Viewing To Do Lists, page 249

CHAPTER 16

Managing Other Initiatives

This chapter provides an overview of other initiative management and discusses 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 6, "Setting Up Initiatives," page 45

Understanding Other Initiatives

This section lists prerequisites and discusses other initiative management.

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 45.

Other Initiative Management

The Other Initiatives portion of 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 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 11, "Managing Initiatives," page 227

Managing General Initiative Information

You manage other initiatives in 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.

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 11, "Managing Initiatives," page 227.

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 11, "Managing Initiatives," Understanding the Initiative Mass Change Template, page 252.

Setting Intermediate Goals

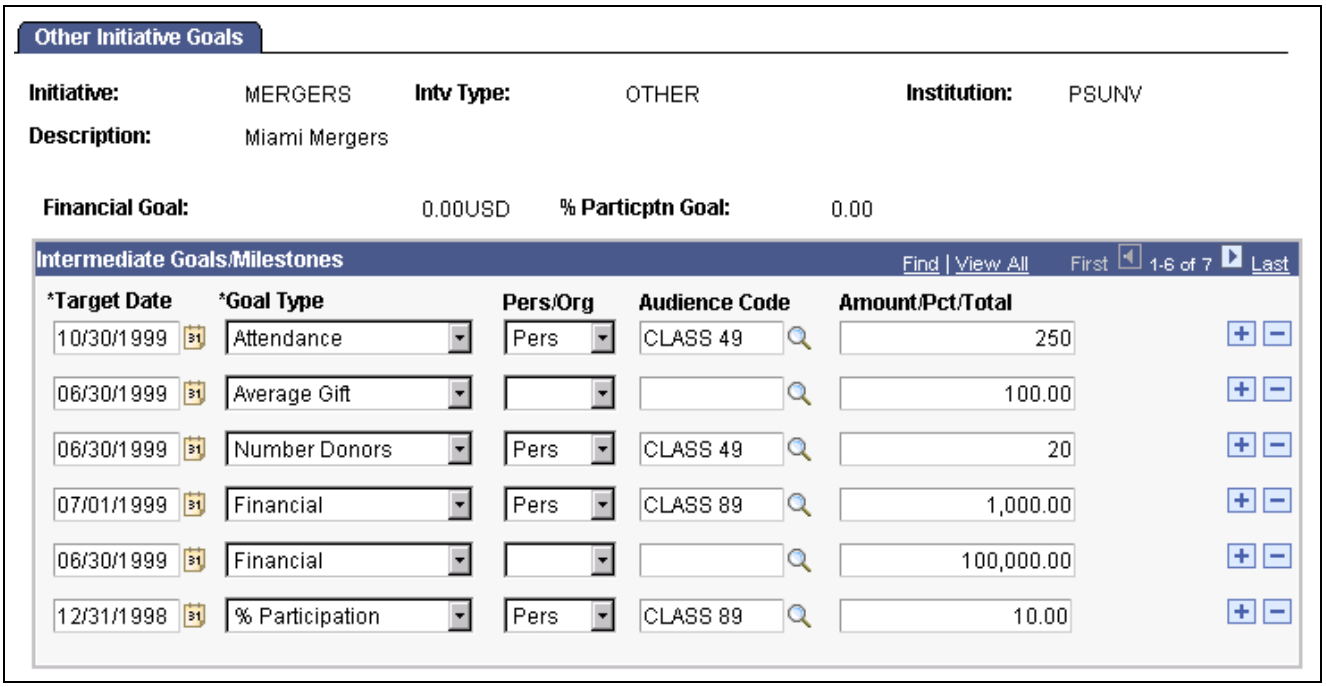
This section discusses how to set intermediate goals for an other initiative.

Page Used to Set Intermediate Goals

Page Name	Object Name	Navigation	Usage
Other Initiative Goals	AV_INTV_OTHR_GOAL	Contributor Relations, Initiatives, Other Initiatives, Manage Other Initiatives, Other Initiative Goals	Set up intermediate goals or milestones for an initiative.

Setting Other Initiative Goals

Access the Other Initiative Goals page.



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 Code 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 To Do Lists

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 11, "Managing Initiatives," Viewing To Do Lists, page 249

CHAPTER 17

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 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 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 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.

After 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 when particular conditions are met. For example, if Shawn Gallegher pledges 40,000 USD to the 2005 Fund Campaign, but will only give that amount when you have raised 2,000,000 USD, his pledge is conditional. You can transfer the information you enter about conditional pledges to the actual pledge transaction after the conditions are met and the pledge is activated.

After 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 8, "Managing Constituent Data," Searching for People, page 123.
Recognition	Select a type of credit the donor is receiving, such as *Hard, Soft, Vehicle,* 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 the 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 18, "Processing Commitments," Understanding the Constituent Accumulators Process, page 385.

Managing Sessions

This section discusses how to:

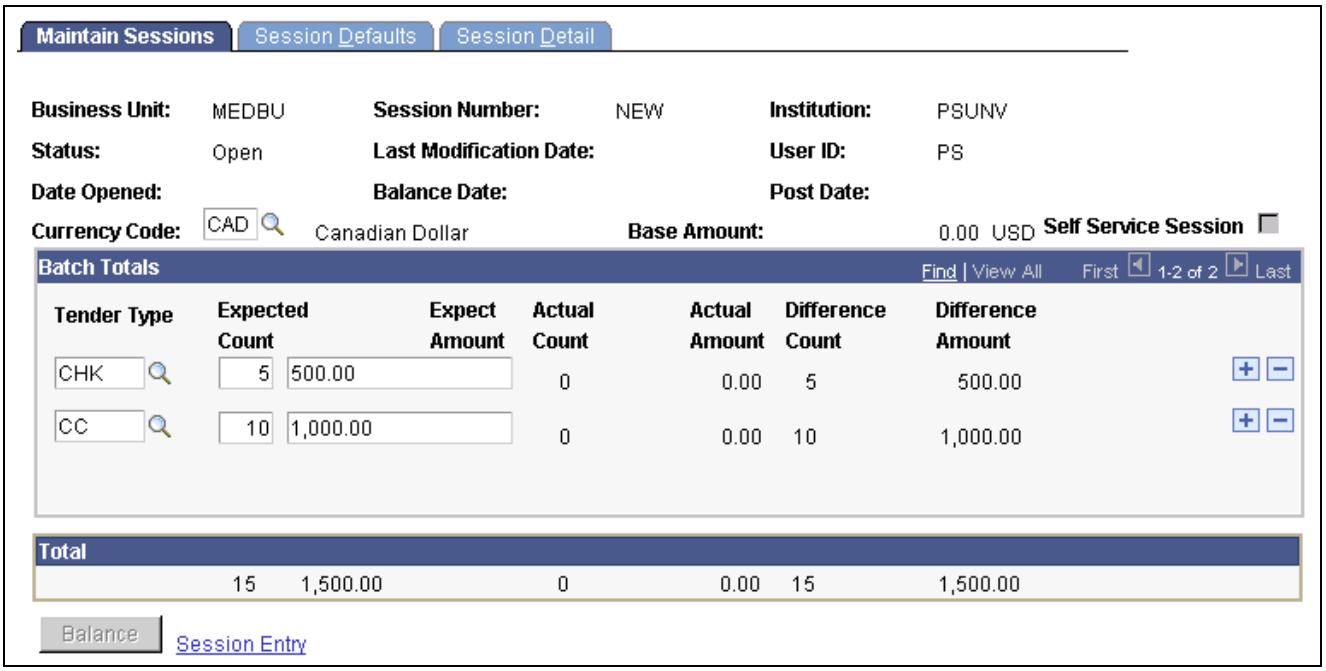
- Initialize and balance a session.
- Select session defaults.
- View session detail and select transactions to modify.

Pages Used to Manage Sessions

Page Name	Object Name	Navigation	Usage
Maintain Sessions	AV_BTCH_TOT, AV_BTCH_PL_TOT, AV_BTCH_M_TOT	• Contributor Relations, Session Management, Enter Gifts, Maintain Gift Sessions, Maintain Sessions • Contributor Relations, Session Management, Enter Pledges, Maintain Pledge Sessions, Maintain Sessions • Contributor Relations, Session Management, Enter Memberships, Maintain Membership Sessions, Maintain 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	• Contributor Relations, Session Management, Enter Gifts, Maintain Gift Sessions, Session Defaults • Contributor Relations, Session Management, Enter Pledges, Maintain Pledge 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	Contributor Relations, Session Management, Enter Gifts, 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 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 the 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 (expected amount) Enter the total amount of donations or pledges you expect to enter with the tender type you selected. You can enter an expected amount of zero to allow for zero-amount gifts such as gifts-in-kind.

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

After 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 when 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.

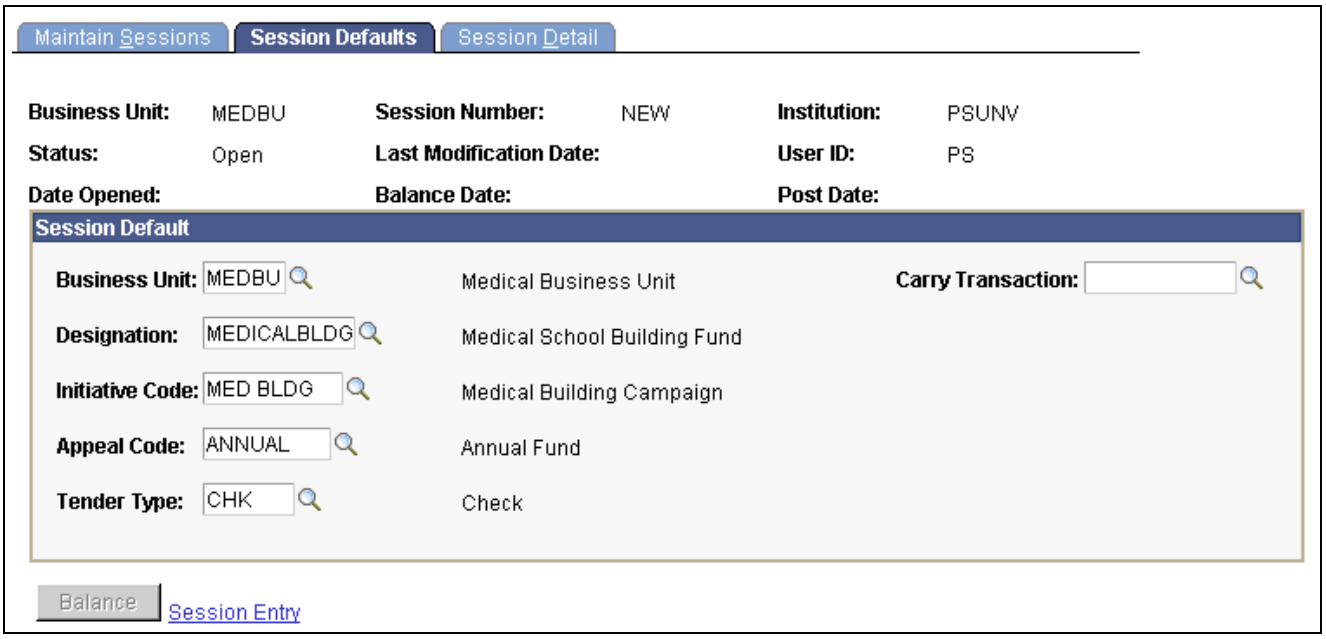
When the session balances, it is available to queue and post.

See Also

Chapter 18, “Processing Commitments,” Re-Opening and Editing Expected Counts and Amounts for Sessions, page 410

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.



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. When 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.

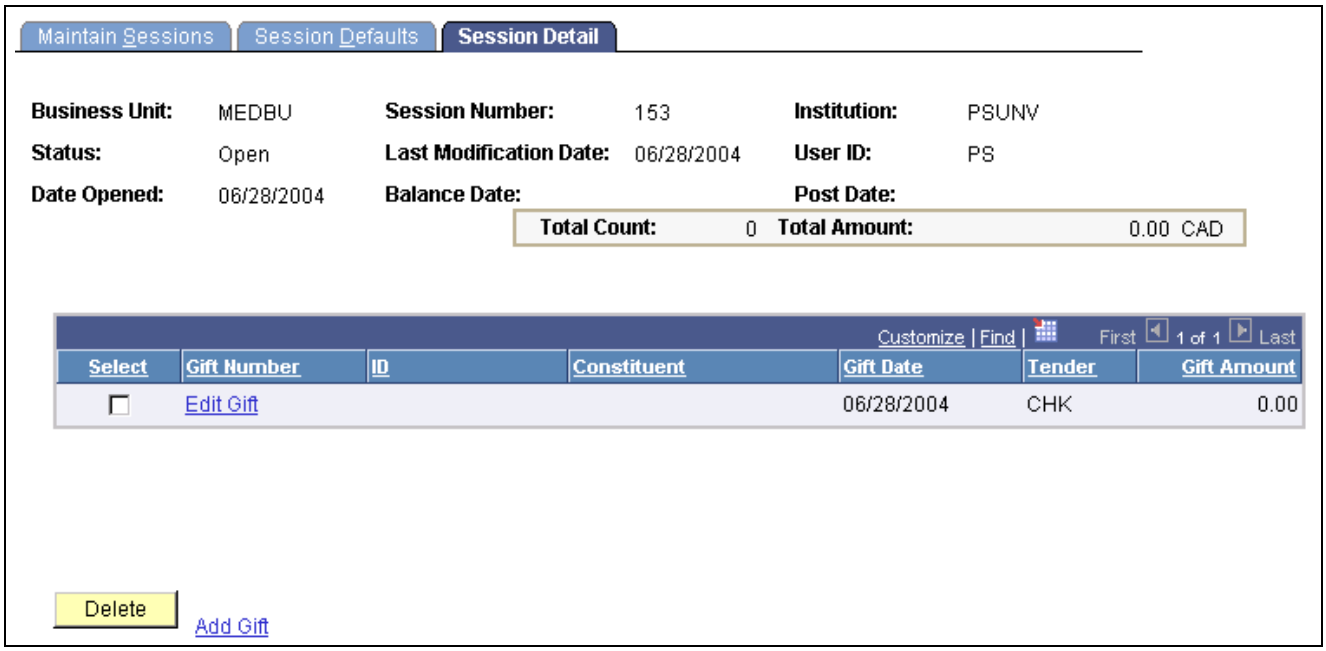
Note. If you select a new business unit, the remaining fields on this page default to the values set as user defaults for that business unit; however, you can override these values.

See Also

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Setting User Defaults," Defining Contributor Relations User Defaults

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 page

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 Number or **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 Gifts and Pledge Payments

This section provides an overview of gifts 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

After you've created a gift session, you can enter gift or pledge payment transactions into the session. 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 17, "Entering Commitments," Initializing and Balancing the Session, page 328.

2. Select session defaults using the Session Defaults page.

   See Chapter 17, "Entering Commitments," Selecting Session Defaults, page 330.

3. Enter transactions using the Gift Entry page.

   See Chapter 17, "Entering Commitments," Entering a Gift Transaction, page 335.

4. Balance, queue, and post the session.

   See Chapter 18, "Processing Commitments," Queuing Sessions for Posting, page 379 and Chapter 18, "Processing Commitments," Processing and Posting Sessions, page 381.

5. (Optional) View the accounting lines generated for the gift session.

   See Chapter 18, "Processing Commitments," Viewing Accounting Lines, page 402.

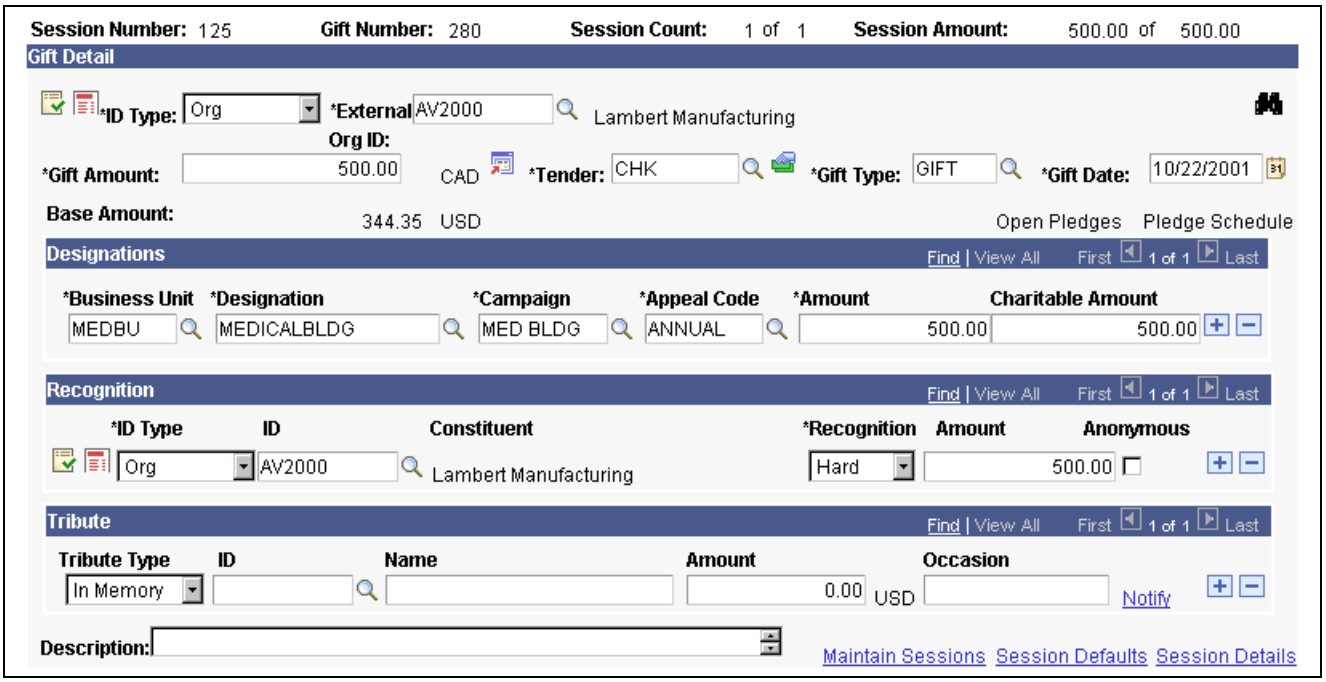
Pages Used to Enter Gifts and Pledge Payments

Page Name	Object Name	Navigation	Usage
Gift Entry	AV_GIFT_ENTRY	• Contributor Relations, Session Management, Enter Gifts, Gift Entry • Click the Session Entry link on the Manage Sessions page.	Enter gift or pledge payment transactions within 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 Pledge Schedule link on the Gift Entry page.	Set up a pledge payment schedule that indicates the date and amount of each expected pledge payment.

Page Name	Object Name	Navigation	Usage
Update Information (for people)	AV_UPDATE	• Contributor Relations, Constituent Information, People, Add/Update a Person • Click the Update Record button on the Gift Entry or Gift Adjustment page.	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	• Contributor Relations, Constituent Information, External Organizations, Update Organization • Click the Update Record button on the Membership Entry or Membership Adjustment page	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.



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 Record 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 or **External Org ID** Enter the ID number of the donor making the gift or pledge payment. 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 8, "Managing Constituent Data," Searching for People, page 123.

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 the 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 do 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 enter a tender type that has the *Allow Zero Amount* Special Field selected on setup, you can enter a Gift Amount of zero. Otherwise, the gift amount must be greater than zero.



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 17, "Entering Commitments," Entering Check or Credit Card Information, page 339.

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 the 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 does 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 the 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 the 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 *In Memory* or *In Honor* 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 17, "Entering Commitments," Entering Tribute Details, page 341.

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.

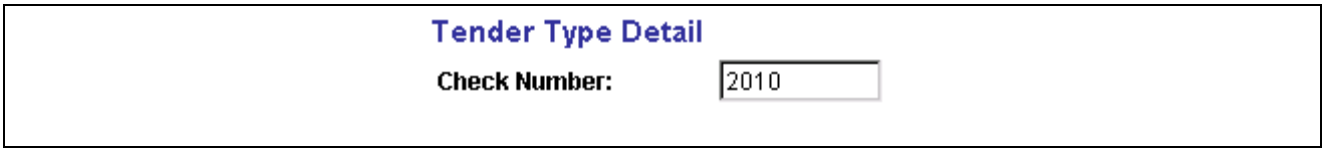
See Also

Chapter 17, "Entering Commitments," Updating or Adding a Constituent Who is a Person, page 344

Chapter 17, "Entering Commitments," Updating or Adding a Constituent Who is an Organization, page 345

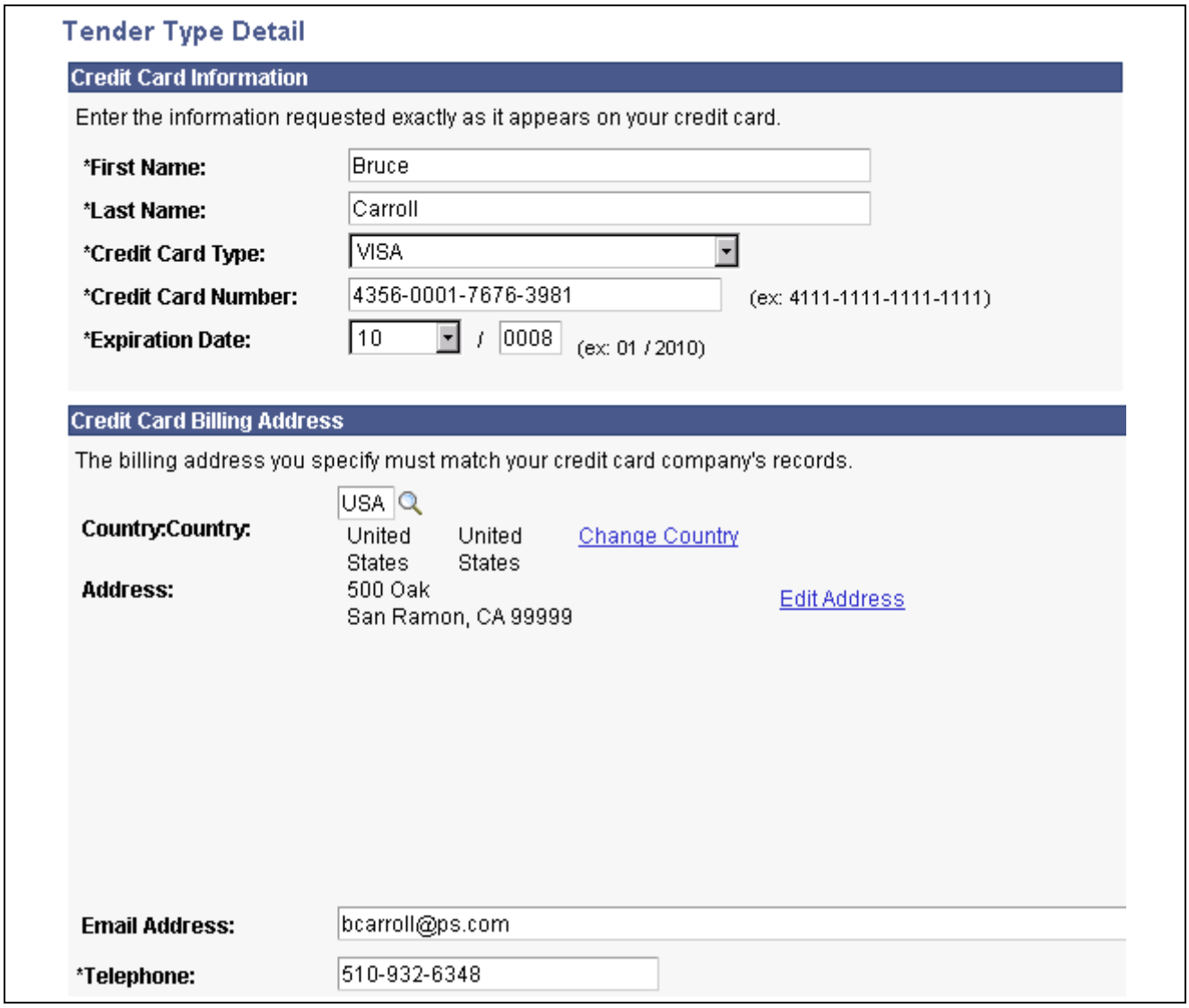
Entering Check or Credit Card Information

Access the Tender Type Detail page. This page changes depending on whether you selected *Check* or *Credit Card* in the Special Fields field on the Tender Types page.



Tender Type Detail − Check page

Check Number If you selected *Check* as the tender on the Gift Entry page, enter the check number.



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 7, "Setting Up Commitment Management," Defining Credit Card Types, page 106.

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.

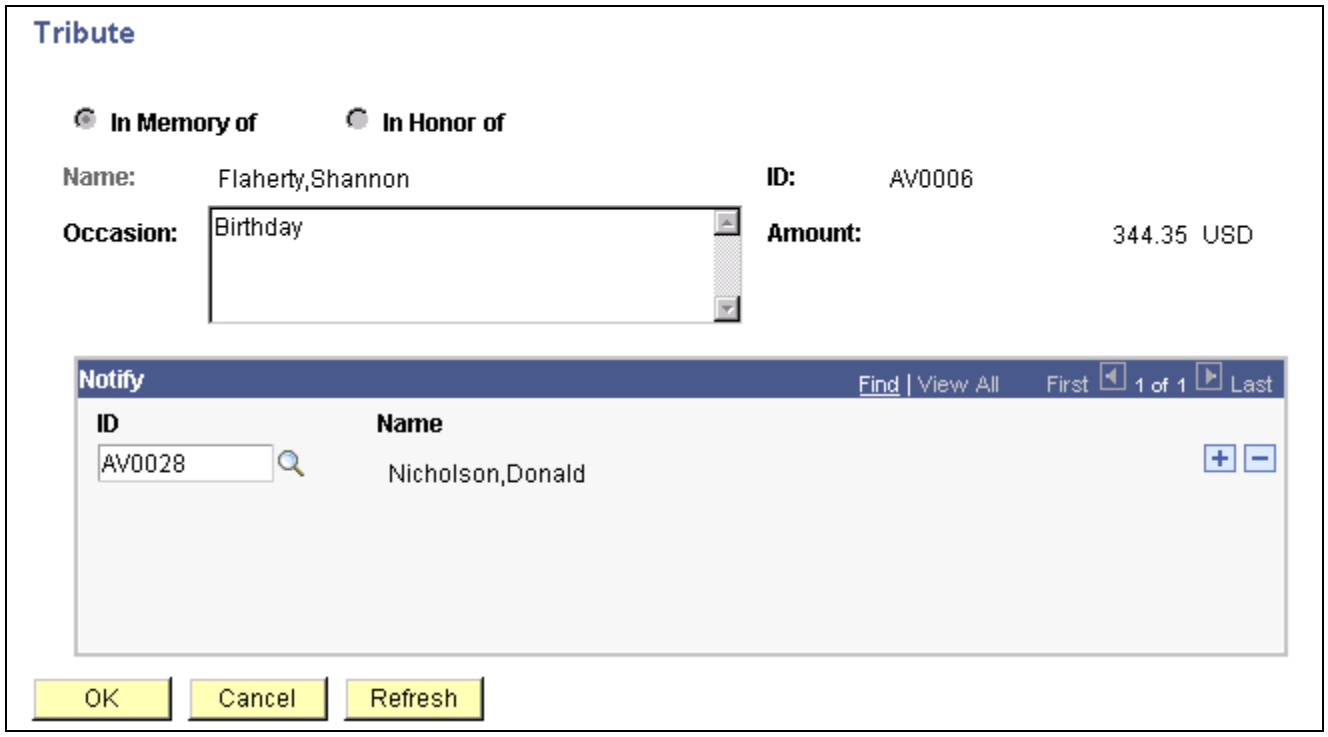
Click OK to validate any changed information, save, and close the page.

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 0.00 USD), and the address information. If there are any errors on this page, the system returns a message and prompts for corrections.

Click Cancel to cancel the entry, ignore any changed information, and close the page without saving.

Entering Tribute Details

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 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.

Note. No workflow is delivered with this 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.

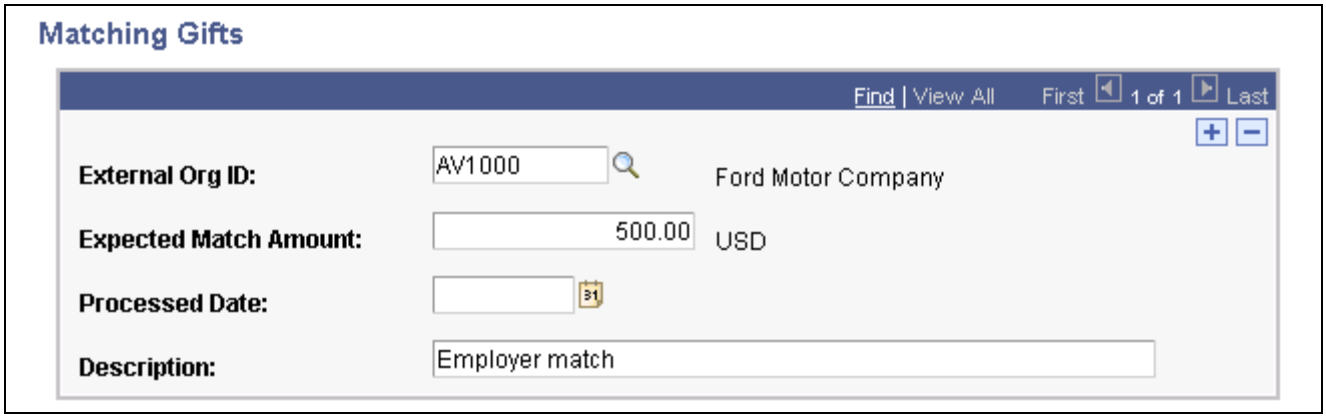
Amount This field populates by default with the amount of the person's gift or pledge from the Amount field on the Gift Entry page.

Notify

Enter the staff ID of the person to be notified of the transaction. The name appears to the right.

Identifying Potential Matching Gifts

Access the Matching Gifts page.



Matching Gifts 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.

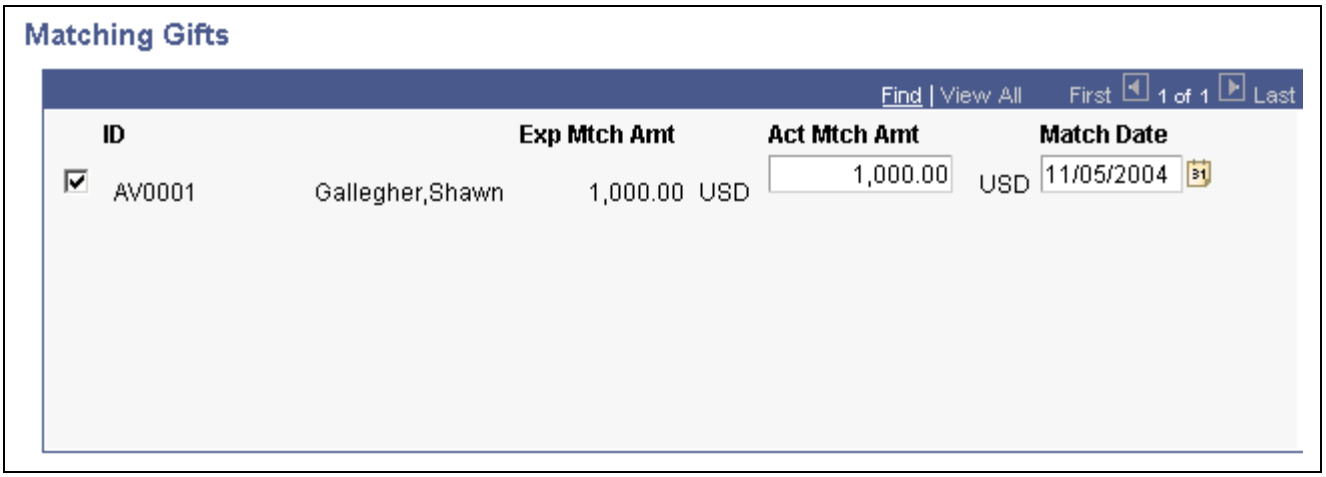
Expected Match Amount Enter the amount you expect to receive as a match.

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 when 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 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.

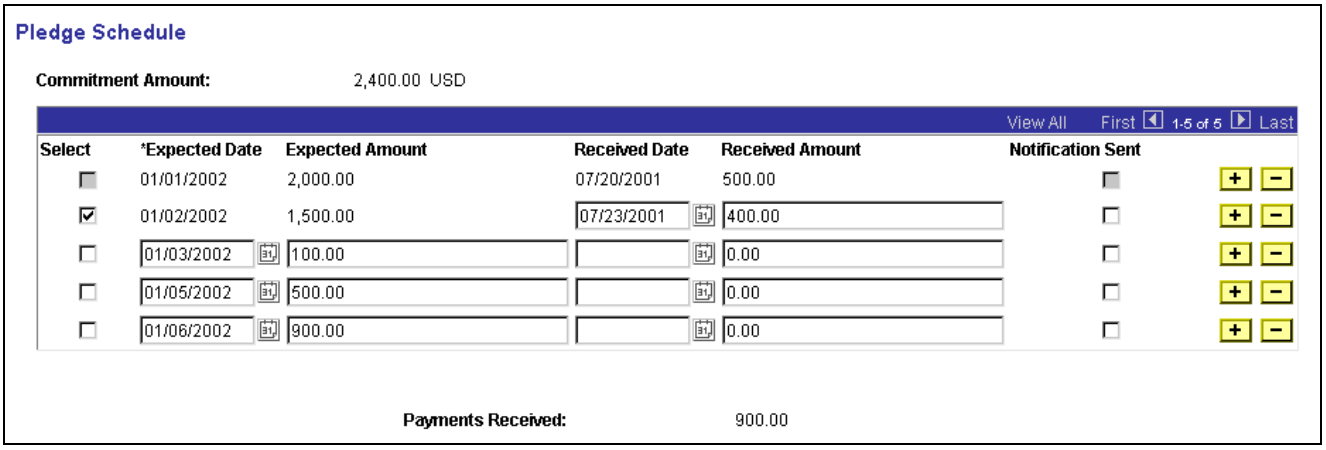
ID Select the check box for the gift that is being matched by the organization's matching gift payment.

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 page

Select Select the check box 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.

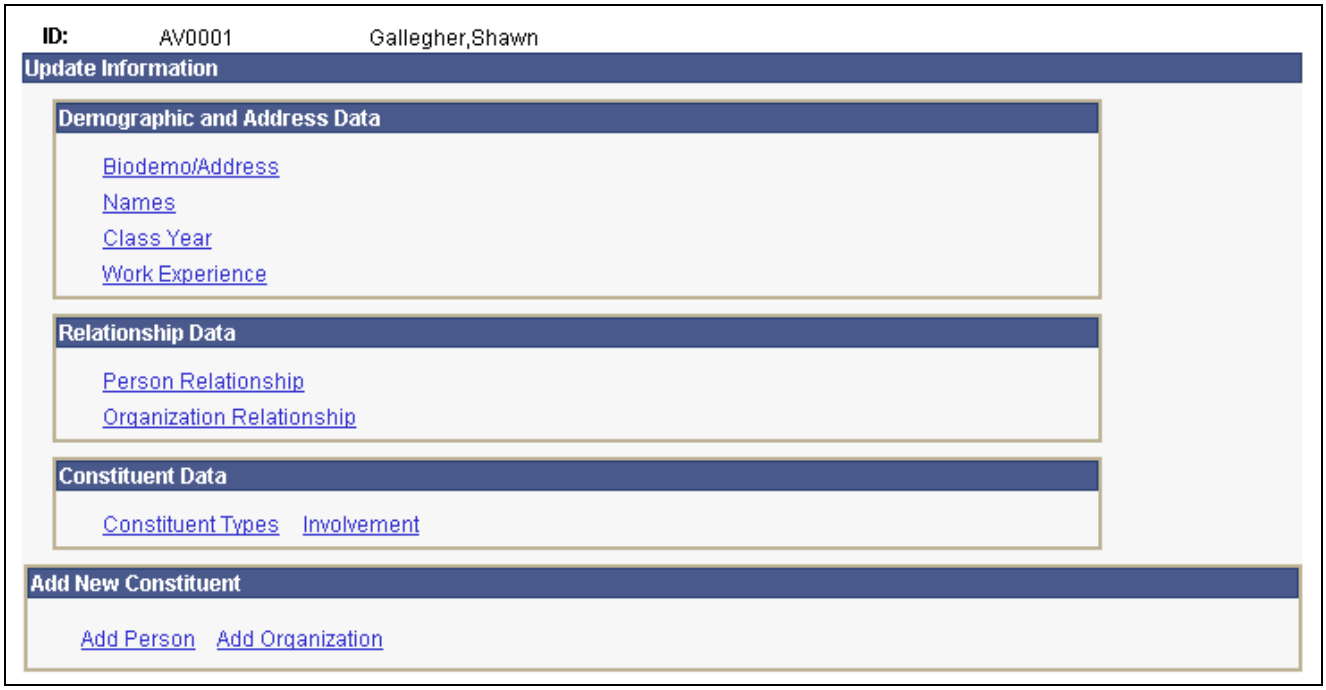
Received Amount Enter the monetary amount of a pledge payment.

Notification Sent Select to indicate that a notification of the scheduled pledge payment has been sent.

Note. No workflow is delivered with this page.

Updating or Adding a Constituent Who is a Person

Access the Update Information page.



Update Information page (person)

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.

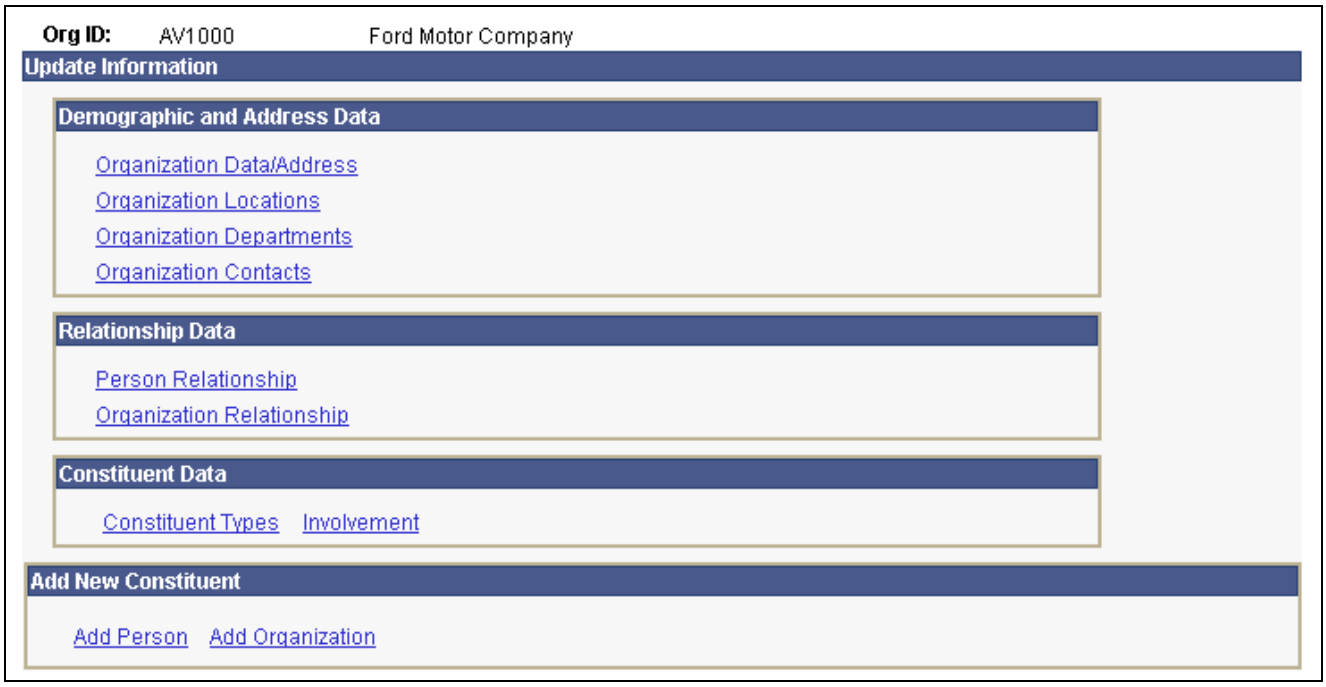
Add New Constituent

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.

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.

Updating or Adding a Constituent Who is an Organization

Access the Update Information page.



Update Information page (organization)

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 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.

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.

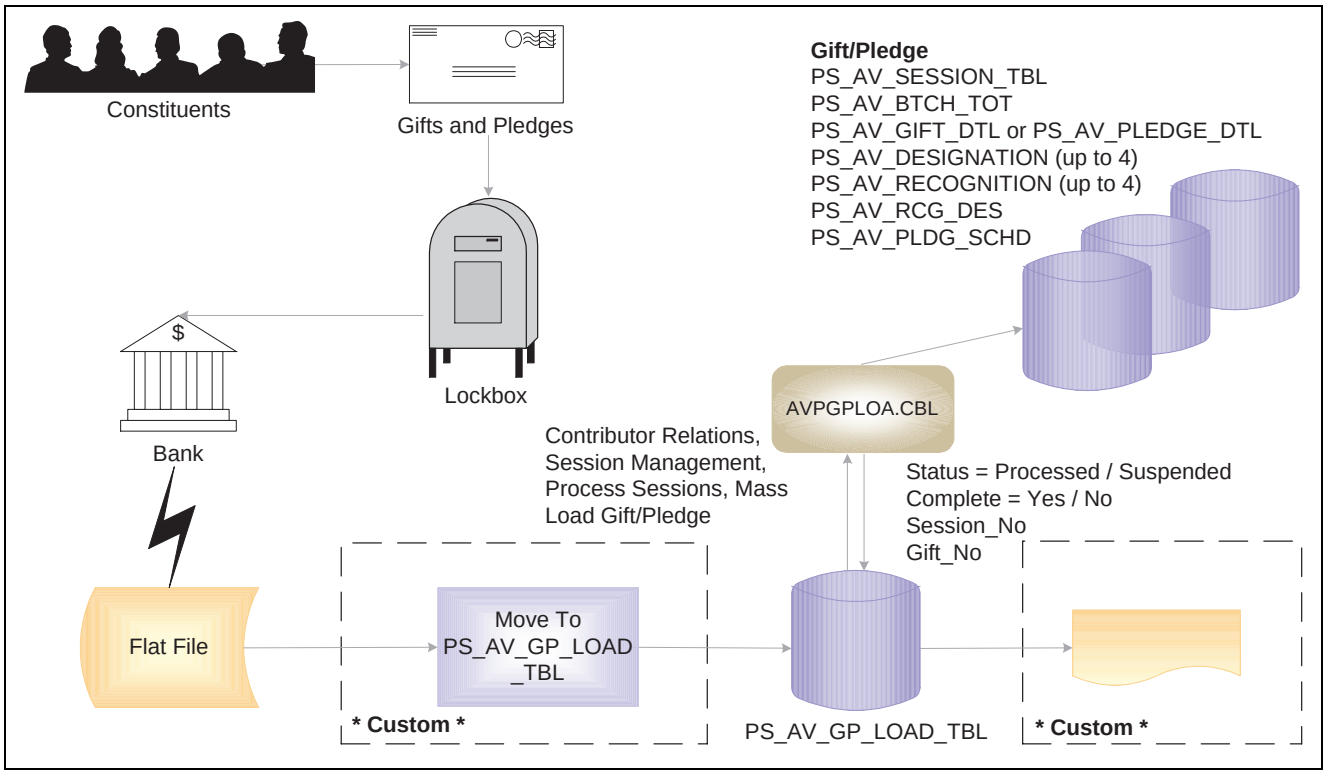
Page Used to Load Mass Gift and Pledge Transactions

Page Name	Object Name	Navigation	Usage
Mass Load Gift/Pledge	AV_RUN_CNTL	Contributor Relations, Session Management, Process Sessions, Mass Load Gift/Pledge	Enables you to enter groups of gift and pledge transactions into the system. For example, this process can be used to load lockbox transactions.

Loading Gifts and Pledges

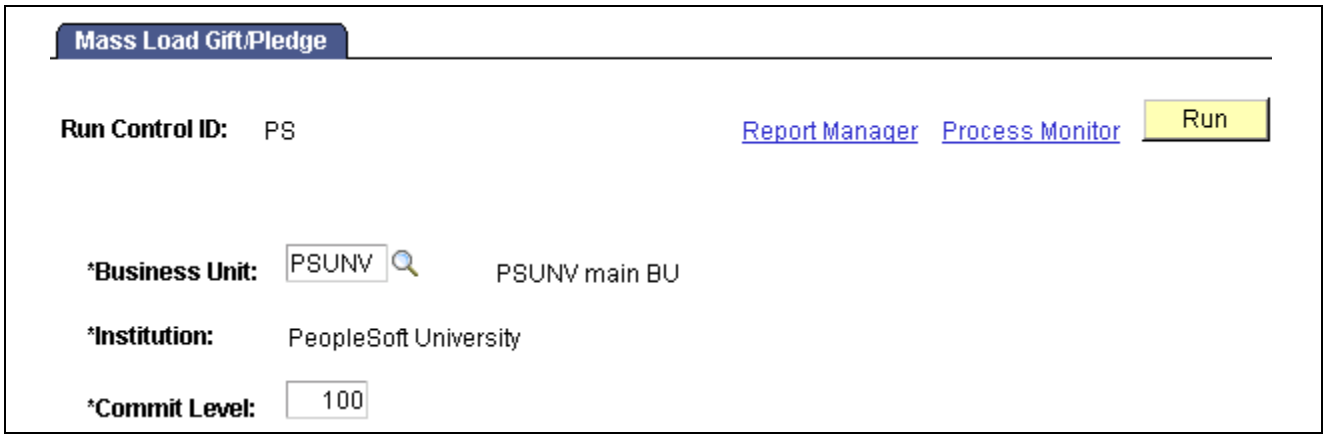
The Mass Load Gift/Pledge COBOL process (AVPGPLOA) takes all the information placed in the AV_GP_LOAD_TBL and moves it into the appropriate tables in the system. Gifts or pledges to be loaded can contain up to four designation records and four recognition records.

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.



How GP Load might fit into a lockbox process at your institution

Access the Mass Load Gift/Pledge page.



Mass Load Gift/Pledge page

Business Unit Enter the business unit for which you want to run the process.

Institution When 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

Appendix A, “AV_GP_LOAD_TBL Data Fields,” page 497

Viewing Gift Session Transactions

When 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.

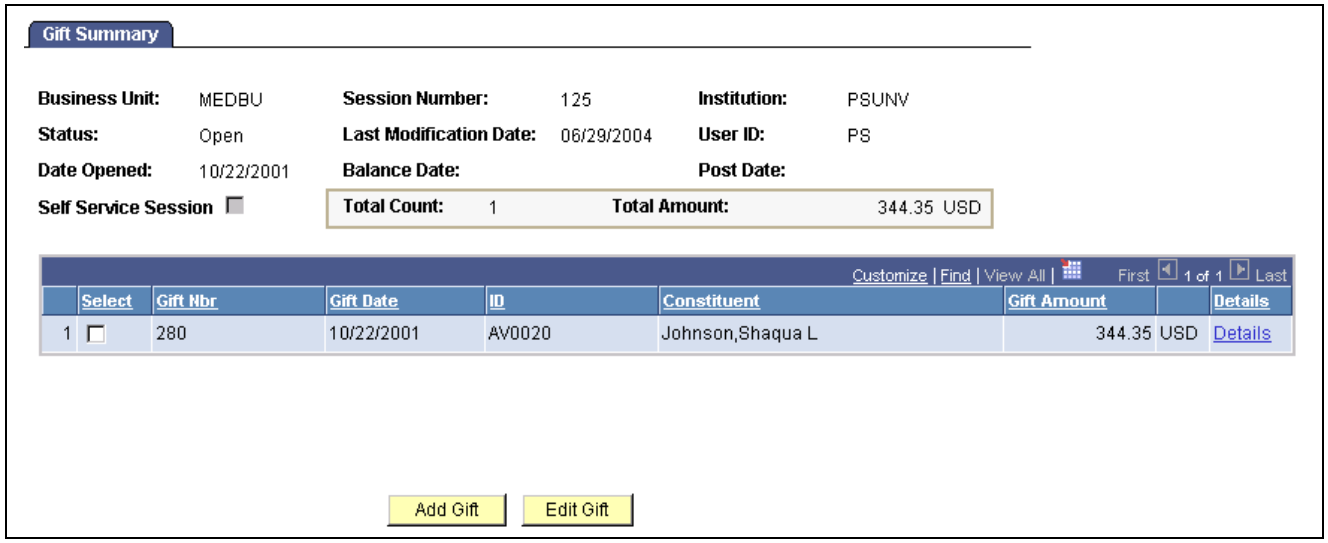
Pages Used to View Gift Session Transactions

Page Name	Object Name	Navigation	Usage
Gift Summary, Supervisor Gift Summ (supervisor gift summary)	AV_GIFT_SMRY	• Contributor Relations, Session Management, Supervise Sessions, Gift Sessions, Gift Summary • Contributor Relations, Session Management, Supervise Sessions, Gift Sessions, Supervisor Gift Summary	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. For supervisors, view information about the gifts and pledge payments staff members enter in sessions.
Gift Detail	AV_GIFT_DTL_SP	• 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_DSG_DTL_SP	• You can access the Designation Detail page through multiple navigation paths. Below is a 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	• 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	• Click the Matching Gifts button on the Gift Detail page. • Click the Details button on the Matching Gifts Summary or Matching Gifts Summary - Org page.	View detailed information about the potential matching gifts for a transaction.

Page Name	Object Name	Navigation	Usage
Tribute	AV_TRIB_INQ_SP	Click the Tribute button on the Gift Detail, Pledge Detail, Adjust Gift Detail, or Adjust Pledge Detail pages.	View all tribute details related to a particular gift or pledge. This information is entered on the Tribute page during gift or pledge entry. **Note.** No workflow is delivered with this page.

Viewing a Gift Summary

Access the Gift Summary page.



Gift Summary page

If your role is a GPS, you may want to view information about the gifts and pledge payments that 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 17, "Entering Commitments," Entering a Gift Transaction, page 335

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.

Click the Tribute button to view detailed tribute and memorial information for a commitment. The Tribute 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 17, "Entering Commitments," Entering a Gift Transaction, page 335

Adjusting Gifts and Matching Gifts

This section provides an overview of gift adjustment and discusses how to

- Enter gift adjustment transactions.
- Edit matching gift information for an organization's adjusted gift.

Understanding Gift Adjustment

You can create gift adjustment sessions, or groups of transactions that correct existing transactions. When 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 17, "Entering Commitments," Initializing and Balancing the Session, page 328.

2. Select session defaults using the Session Defaults page.

   See Chapter 17, "Entering Commitments," Selecting Session Defaults, page 330.

3. Select the existing posted transactions to adjust using the Session Detail page.

See Chapter 17, "Entering Commitments," Viewing Session Details and Selecting Transactions to Edit or Delete, page 332.

4. Make the necessary changes to transactions using the Gift Adjust page.

   See Chapter 17, "Entering Commitments," Entering a Gift Adjustment Transaction, page 353.

5. Balance, queue, and post the session.

   See Chapter 17, "Entering Commitments," Initializing and Balancing the Session, page 328; Chapter 18, "Processing Commitments," Queuing Sessions for Posting, page 379 and Chapter 18, "Processing Commitments," Processing and Posting Sessions, page 381.

Page Used to Adjust Gifts and Matching Gifts

Page Name	Object Name	Navigation	Usage
Gift Adjust	AV_ADJ_GIFT	• Contributor Relations, Session Management, Enter Gifts, Gift Adjustment • Click a Gift Nbr link on the Session Detail page.	Adjust an existing gift transaction you selected on the Session Detail page.
Matching Gifts	AV_MTCH_P_GIFT_SP	Click the Matching Gifts button on the Gift Adjust page.	Modify selections made previously, associating an organization's matching gift payment with a specific gift or adding additional IDs.

Selecting a Transaction to Adjust

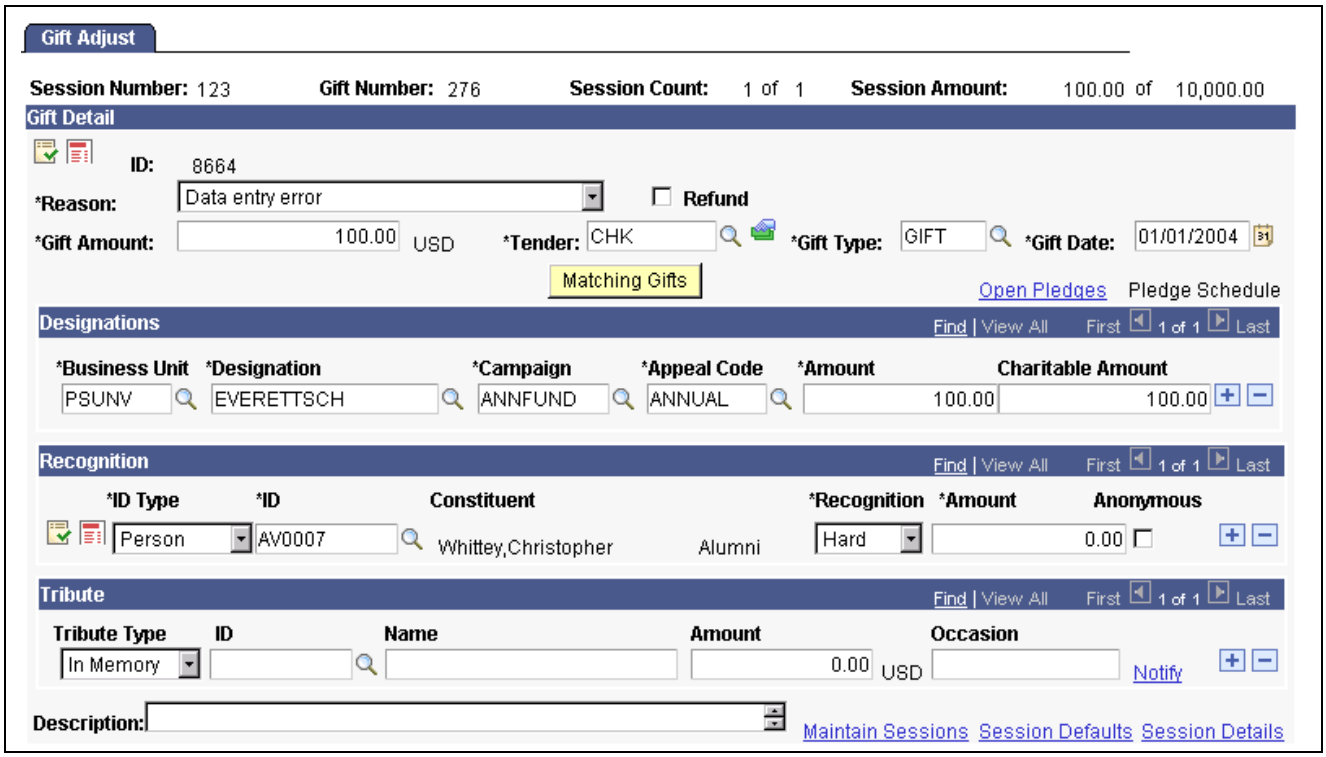
Use the Session Detail page to choose a gift or pledge to adjust.

See Chapter 17, "Entering Commitments," Viewing Session Details and Selecting Transactions to Edit or Delete, page 332.

Entering a Gift Adjustment Transaction

Access the Gift Adjust page.

Important! The original transaction must be posted before you can adjust it.



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 the business unit's base currency, two new page controls display on this page.

Currency Code	Fields That Appear	Fields That Disappear
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.

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 17, "Entering Commitments," Entering a Gift Transaction, page 335

Adjusting Matching Gift Information

Access the Gift Adjust page.

To adjust matching gift information associated with an organization's gift:

1. Select a Reason for the adjustment.
2. Make other adjustments to the page as necessary.
3. Click the Matching Gifts button.

   The Matching Gifts page appears.

Editing Matching Gift Information

Access the Matching Gifts page.



Matching Gifts page

When you enter this page, the system displays theExternal Org ID, Name, Exp Mtch Amt (expected match amount), Act Mtch Amt (actual match amount), and Match Date for all gifts previously associated with the organization's gift. This page also displays any other open IDs available to be matched.

These fields are editable. You can select or deselect IDs and change match amounts and match dates.

Changing a Gift's Type

If you try to adjust a gift on the Gift Adjust page by changing its Gift Type from *MG* to another value, the system displays an error message that there are still matching gifts associated with it.

To change the gift type:

1. Click OK to close the message window.
2. Change the Gift Type back to *MG*.

3. Click the Matching Gifts button.

   The Matching Gifts page appears.

4. Deselect the associated matching gifts.
5. Return to the Gift Adjust page and change the Gift Type.

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.

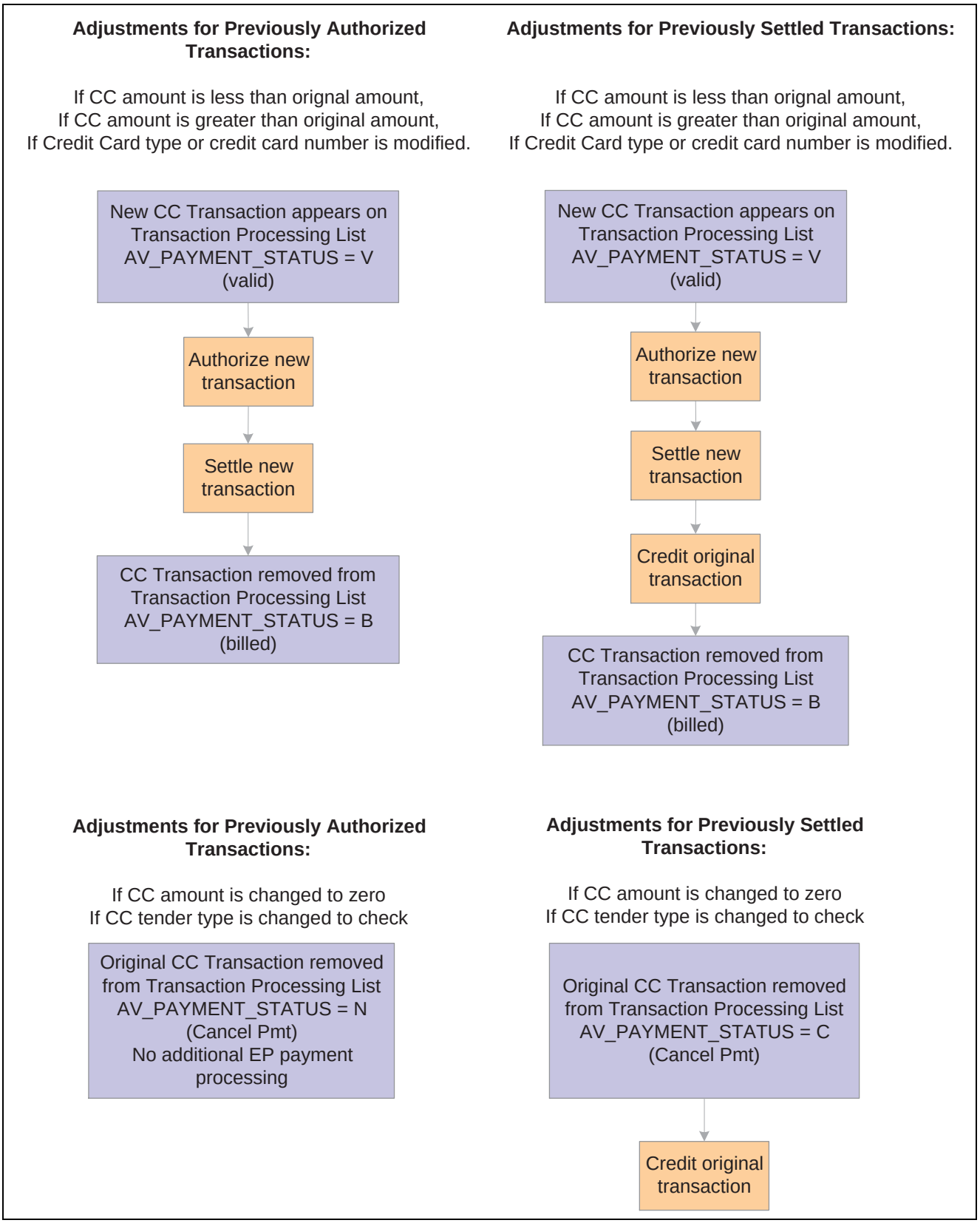
However, any time you change credit card information, you must revalidate, reauthorize, and resettle the transaction. You also need to credit the original gift amount.

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.

When you refund a transaction, its status becomes *C*.

The following graphic illustrates the gift and membership credit card transaction adjustment process described above:



Gift and membership credit card transaction adjustment process

See Also

Chapter 17, "Entering Commitments," Adjusting Gifts and Matching Gifts, page 352

Chapter 18, "Processing Commitments," Processing Credit Card Transactions, page 389

Entering Conditional Pledges

This section provides 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 when particular conditions are met. For example, if Shawn Gallegher pledges 40,000 USD to the 2005 Fund campaign, but will only give that amount when you have raised 2,000,000 USD, his pledge is conditional. You can transfer the information you enter about conditional pledges to the actual pledge transaction when the conditions are met and the pledge is activated.

Important! When 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.

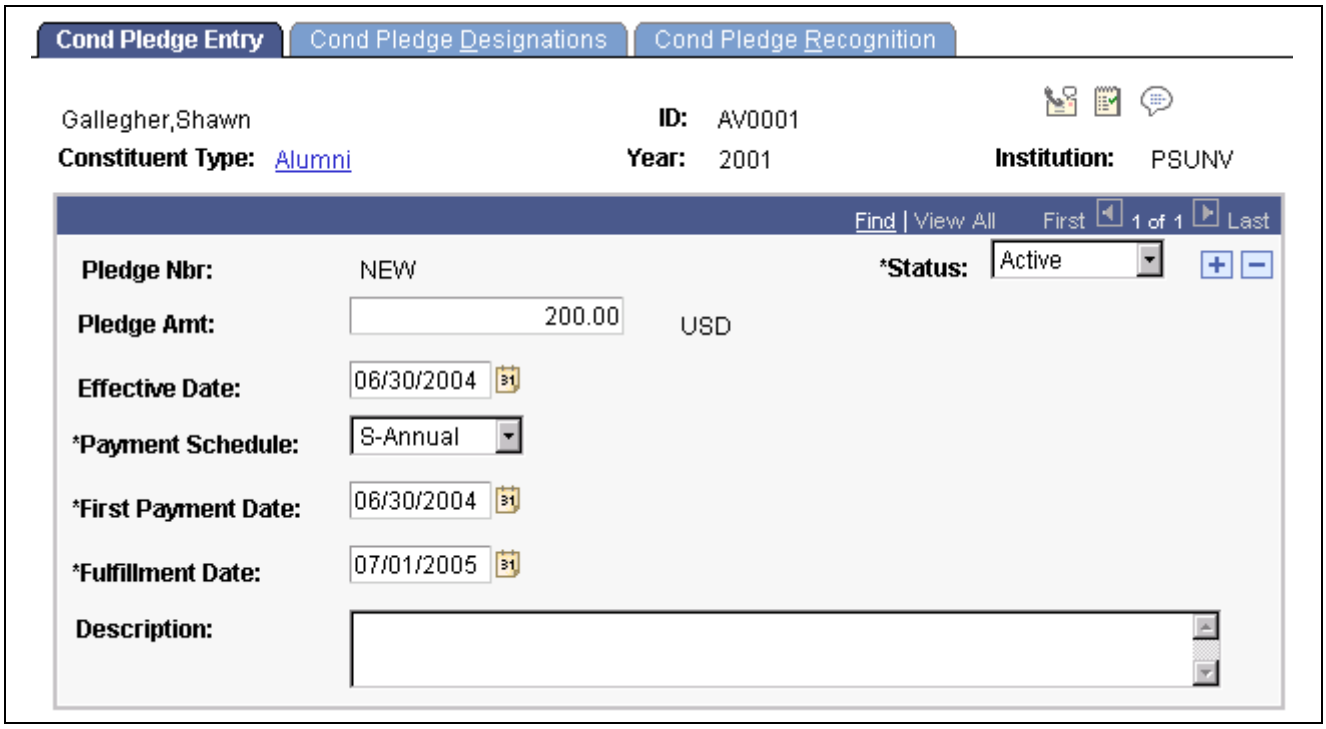
Pages Used to Enter Conditional Pledges

Page Name	Object Name	Navigation	Usage
Cond Pledge Entry (conditional pledge entry)	AV_CP_ENTRY, AV_CP_ENTRY_E, AV_CP_ENTRY_W	• Contributor Relations, Session Management, Enter Pledges, Conditional Pledges, Conditional Pledges, Cond Pledge Entry • Contributor Relations, Session Management, Enter Pledges, Conditional Pledges, Conditional Pledges - Org, Cond Pledge Entry • Contributor Relations, Session Management, Enter Pledges, Conditional Pledges, Conditional Pledges - Workset, Cond Pledge Entry	Enter basic information about a conditional pledge.

Page Name	Object Name	Navigation	Usage
Cond Pledge Designations (conditional pledge designations)	AV_CP_ENTRY2, AV_CP_ENTRY2_E, AV_CP_ENTRY2_W	• Contributor Relations, Session Management, Enter Pledges, Conditional Pledges, Conditional Pledges, Cond Pledge Designations • Contributor Relations, Session Management, Enter Pledges, Conditional Pledges, Conditional Pledges - Org, Cond Pledge Designations • Contributor Relations, Session Management, Enter Pledges, Conditional Pledges, Conditional Pledges - Workset, 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	• Contributor Relations, Session Management, Enter Pledges, Conditional Pledges, Conditional Pledges, Cond Pledge Recognition • Contributor Relations, Session Management, Enter Pledges, Conditional Pledges, Conditional Pledges - Org, Cond Pledge Recognition • Contributor Relations, Session Management, Enter Pledges, Conditional Pledges, Conditional Pledges - Workset, 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 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.

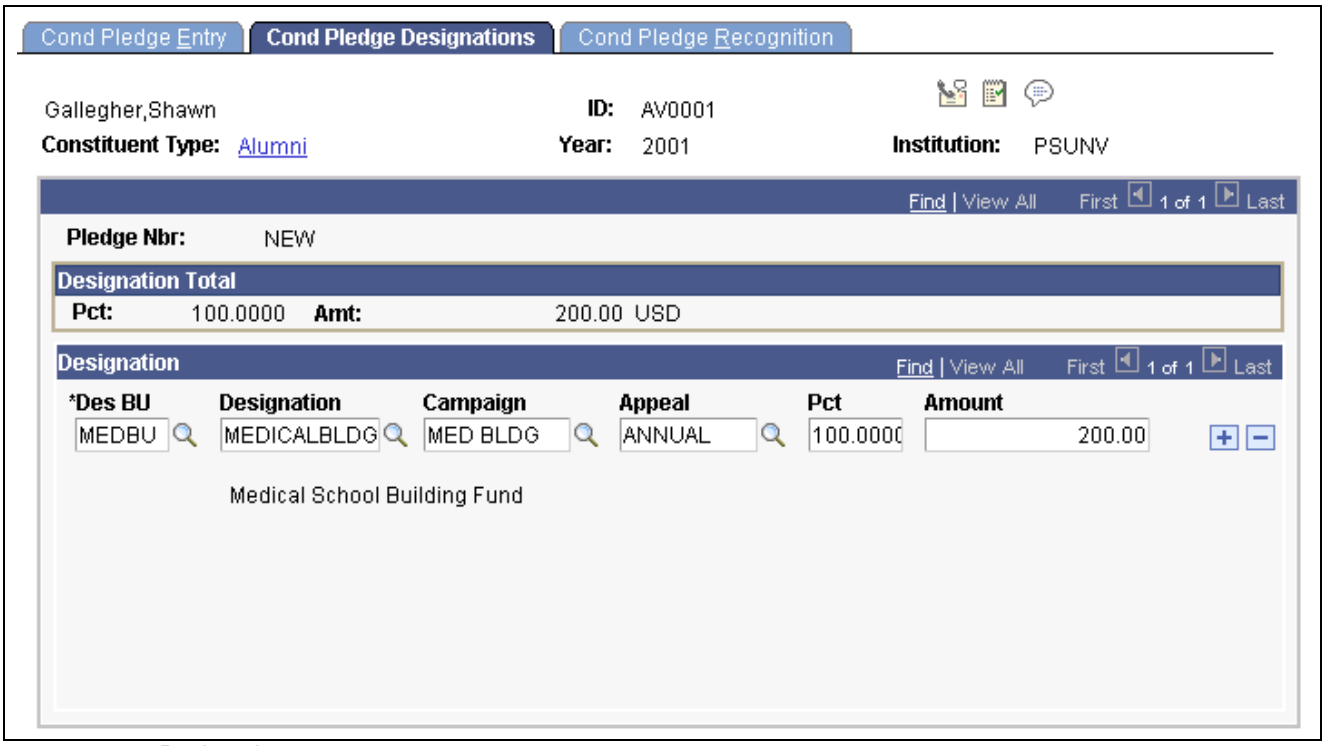
The values are for this field are delivered with the system as translate values. Do not modify these translate values in any way. Any modifications to these values will require a substantial programming effort.

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.

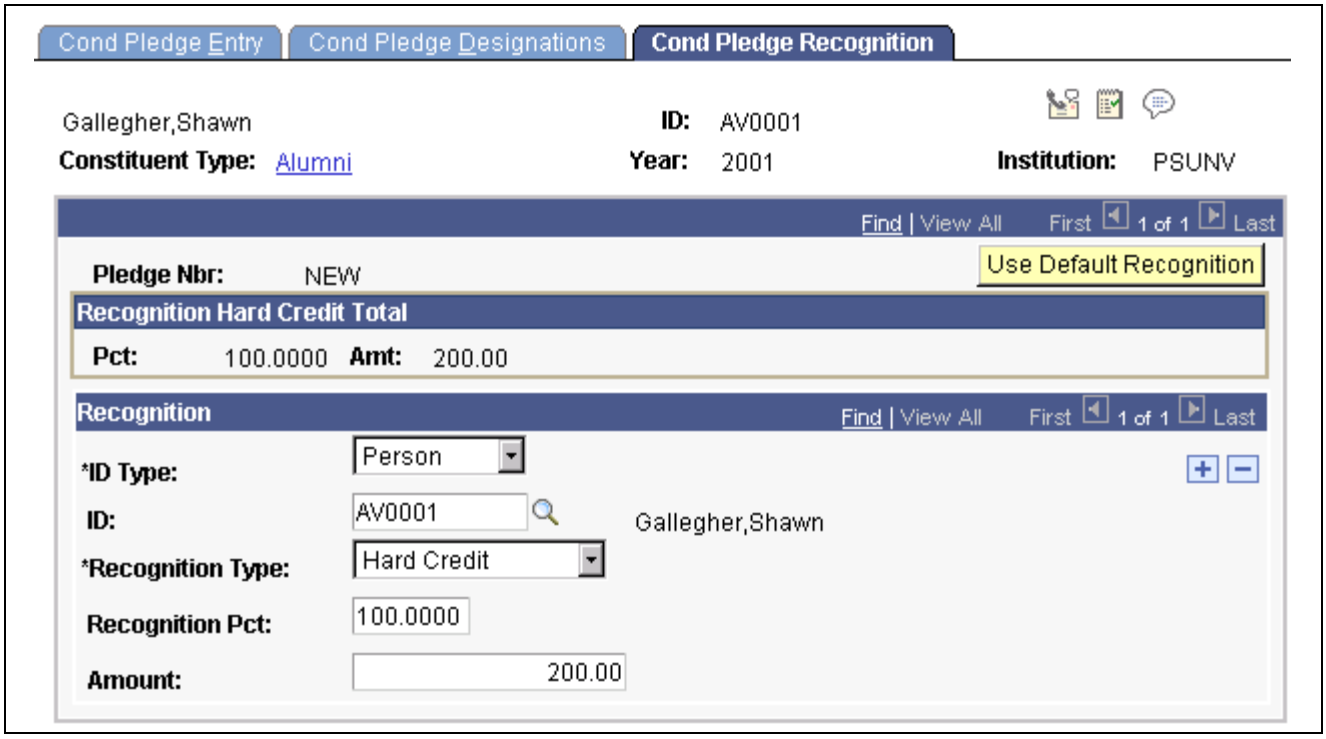
The values that display in the prompt box include the appeals you defined for the setID associated with the business unit you select on this page. The default value is the default appeal you set up when you defined user defaults.

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.



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 *PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook*, "Setting User Defaults," Defining Contributor Relations User Defaults.

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! Recognition is not actually assigned until the conditional pledge is converted to an actual pledge in pledge entry. 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

When 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 17, "Entering Commitments," Initializing and Balancing the Session, page 328.

2. Select session defaults using the Session Defaults page.

   See Chapter 17, "Entering Commitments," Selecting Session Defaults, page 330.

3. Enter transactions using the Pledge Entry page.

   See Chapter 17, "Entering Commitments," Entering Pledges, page 363.

4. Balance, queue, and post the session.

   See Chapter 17, "Entering Commitments," Entering Pledges, page 363; Chapter 18, "Processing Commitments," Queuing Sessions for Posting, page 379 and Chapter 18, "Processing Commitments," Processing and Posting Sessions, page 381.

5. (Optional) View the accounting lines generated by the pledge, if the pledge was fed to the general ledger.

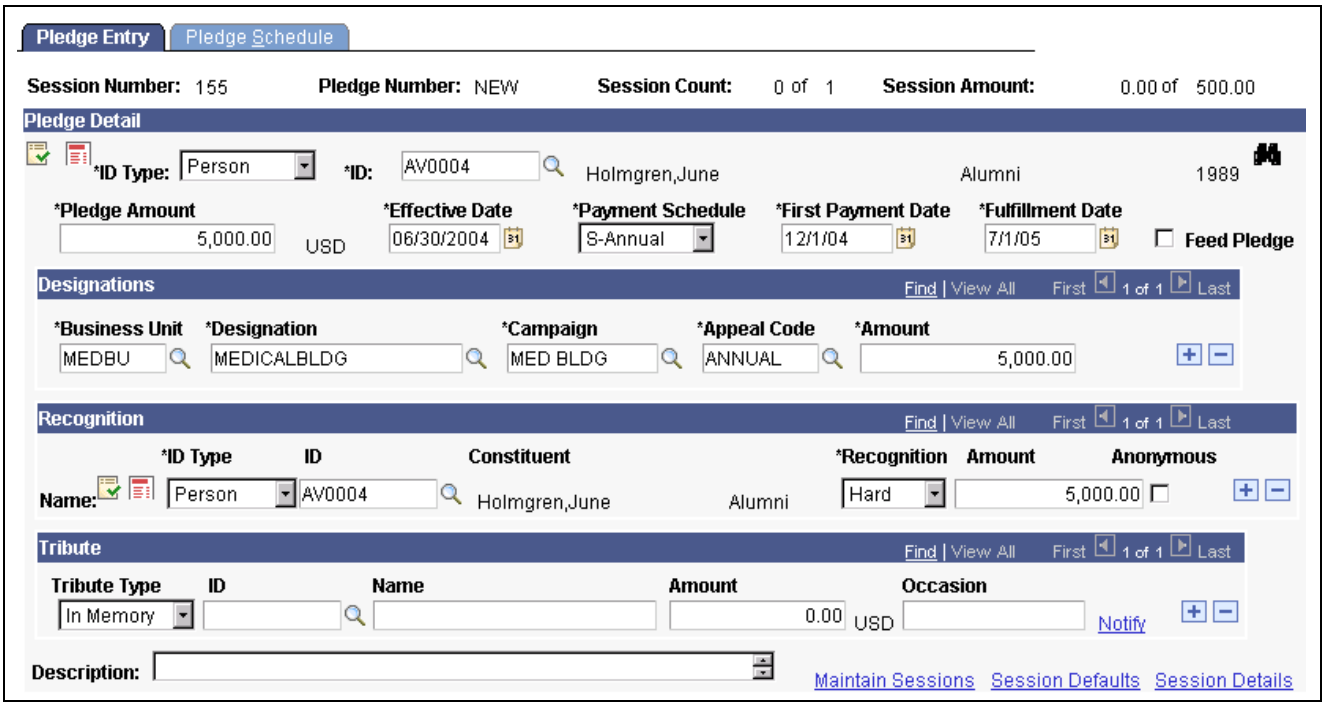
   See Chapter 18, "Processing Commitments," Viewing Accounting Lines, page 402.

Pages Used to Enter Pledges

Page Name	Object Name	Navigation	Usage
Pledge Entry	AV_PLEDGE_ENTRY	• Contributor Relations, Session Management, Enter Pledges, Pledge Entry • Click the Session Entry link on the Maintain Pledge Session page.	Enter pledge transactions into the system.
Pledge Schedule	AV_PLDG_SCHD	• Contributor Relations, Session Management, Enter Pledges, Pledge Entry, Pledge Schedule • Contributor Relations, Session Management, Enter Pledges, Pledge Adjustment, Payment Schedule Adjust	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	• Contributor Relations, Session Management, Enter Pledges, Pledge Schedules, Pledge Schedule • Contributor Relations, Session Management, Enter Pledges, Pledge Schedules, Pledge Schedule - Org	Update the date and amount of anticipated pledge payments for existing pledges.

Entering a Pledge Transaction

Access the Pledge Entry page.



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 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.

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 after 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 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.

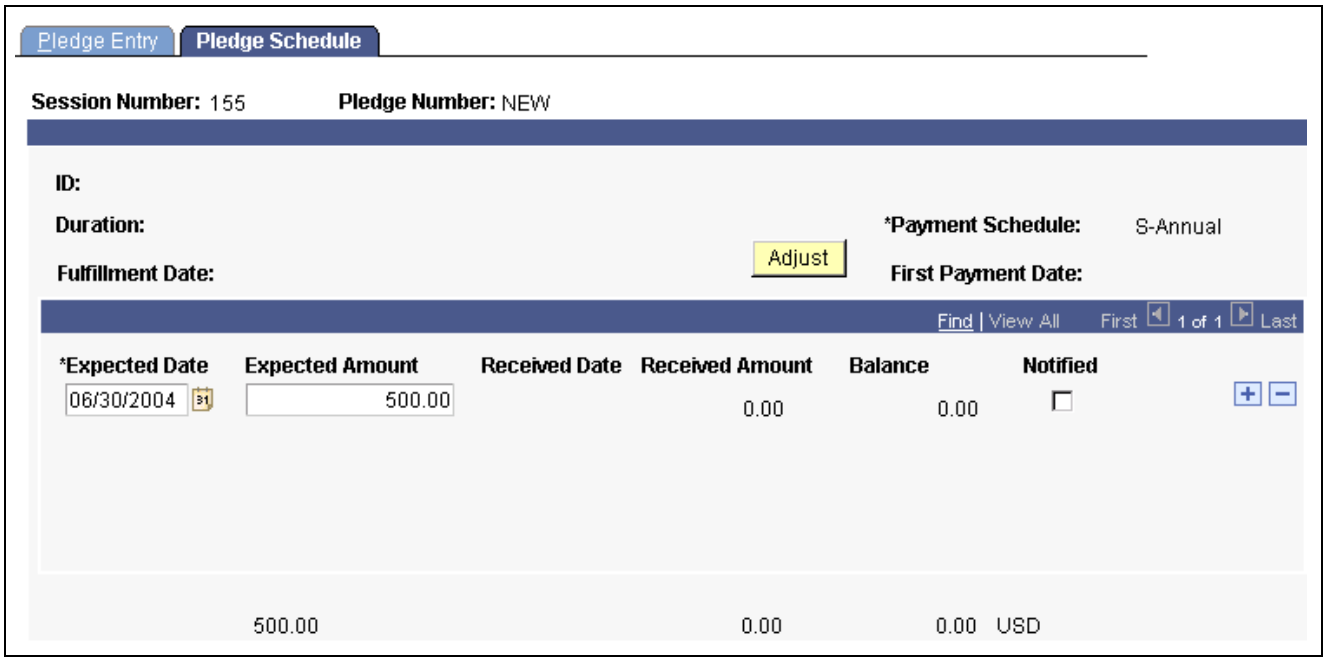
Amount The amount of the pledge populates by default, but you can change this.

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 17, "Entering Commitments," Entering Tribute Details, page 341.

Determining a Pledge Payment Schedule Within a Session

Access the Pledge Schedule page.



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.

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.

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 1,200.00 USD with monthly payments, the pledge is broken into 12 payments of 100 USD.

Received Date Displays the date on which a pledge payment is received.

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.

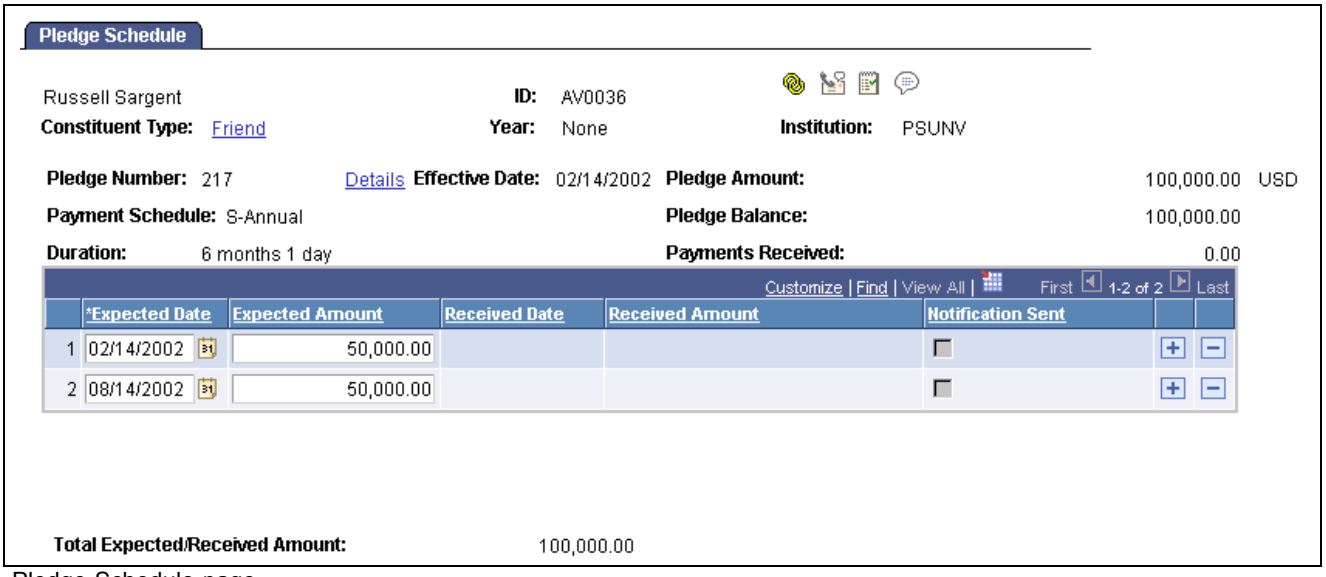
Note. You cannot change expected pledge payments for which notifications have been sent.

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 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 17, “Entering Commitments,” Determining a Pledge Payment Schedule Within a Session, page 367

Viewing Pledges

After 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:

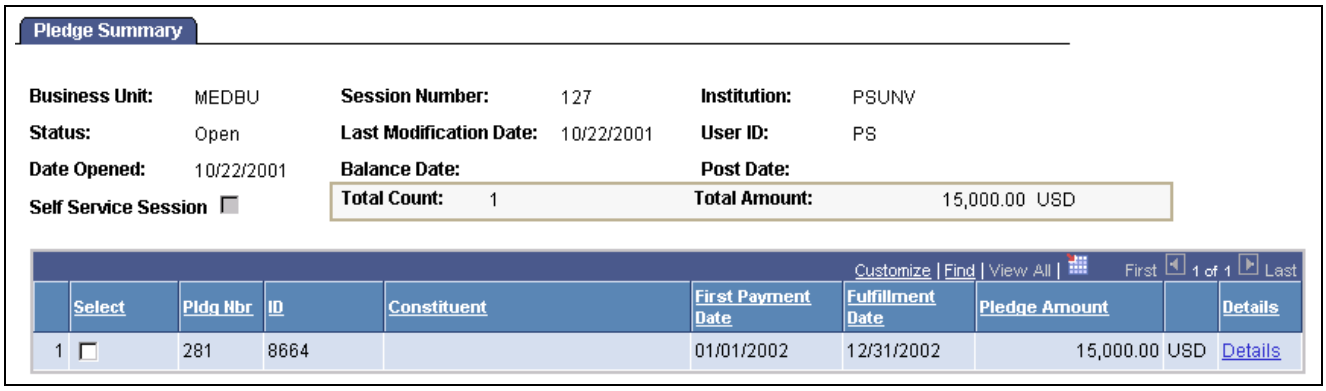
- View a pledge summary.
- View pledge details.
- View a supervisor pledge summary.
- View an open pledge register.
- View a pledge payment schedule.

Pages Used to View Pledges

Page Name	Object Name	Navigation	Usage
Pledge Summary, Supervisor Pledge Summary	AV_PLDG_SMRY	• Contributor Relations, Session Management, Supervise Sessions, Pledge Sessions, Pledge Summary • Contributor Relations, Session Management, Supervise Sessions, Pledge Sessions, Supervisor Pledge Summary	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. For supervisors, view information about the pledges that your staff enters in sessions.
Pledge Detail	AV_PLDG_DTL_SP	• You can access the Pledge Detail page through multiple navigation paths. Below is a frequently used path. • Click the Details button on the Pledge Summary page.	View detailed information about a pledge transaction.
Open Pledge Register	AV_OPEN_PLDG, AV_OPEN_PLDG_E, AV_OPEN_PLDG_W	• Contributor Relations, Analyze Giving History, Person Giving Summaries, Open Pledge Register • Contributor Relations, Analyze Giving History, Organization Giving Summaries, Open Pledge Register-Org • Contributor Relations, Session Management, Enter Pledges, Pledge Schedules, Open Pledge Register - Workset	View a summary of a donor's pledges with open balances.
Pledge Schedule	AV_PLDG_SCHD_INQ, AV_PLDG_SCHD_INQ_E	• Contributor Relations, Analyze Giving History, Person Giving Summaries, Pledge Schedule • Contributor Relations, Analyze Giving History, Organization Giving Summaries, Pledge Schedule - Org	View information about the payment schedule associated with a particular pledge.

Viewing a Pledge Summary

Access the Pledge Summary page.



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 cannot 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 17, "Entering Commitments," Viewing a Supervisor's Pledge Summary, page 372

Chapter 17, "Entering Commitments," Entering a Pledge Transaction, page 364

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.

Click the Tribute button to view detailed tribute and memorial information for a pledge. The Tribute 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

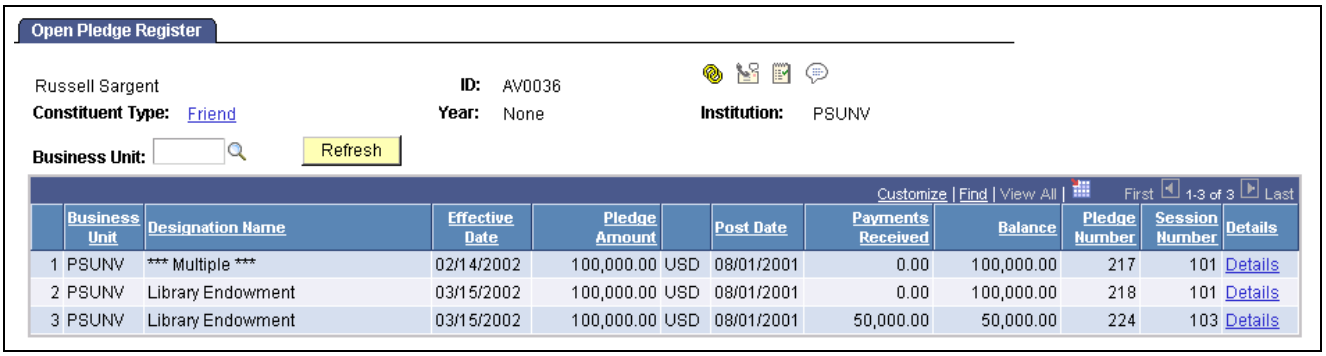
When you open this page, the gift number, effective date, first payment date, fulfillment date, and gift amount display for each transaction in the session you selected.

See Also

Chapter 17, "Entering Commitments," Entering a Pledge Transaction, page 364

Viewing an Open Pledge Register

Access the Open Pledge Register page.

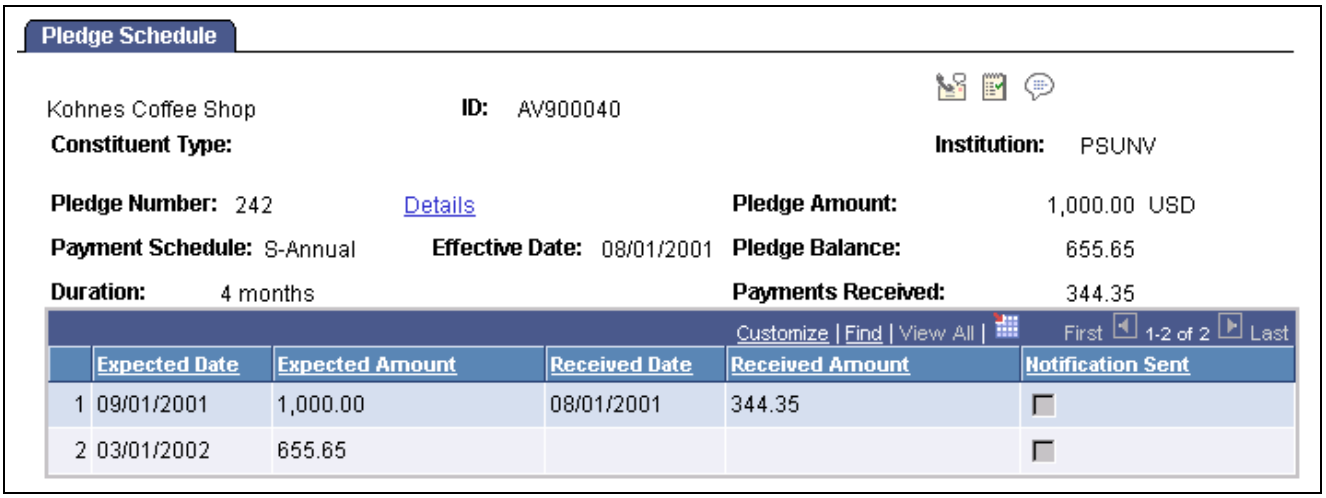


Open Pledge Register page

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 inquiry 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 17, "Entering Commitments," Determining a Pledge Payment Schedule Within a Session, page 367

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. After 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 17, “Entering Commitments,” Understanding the Gift and Pledge Process, page 325.

To adjust pledge transactions:

1. Initialize a session with the type of Adjust Pledge, using the Maintain Pledge Sessions page.

   See Chapter 17, “Entering Commitments,” Initializing and Balancing the Session, page 328.

2. Select session defaults using the Session Defaults page.

   See Chapter 17, “Entering Commitments,” Selecting Session Defaults, page 330.

3. Select the existing transactions to adjust using the Session Detail page.

   See Chapter 17, “Entering Commitments,” Viewing Session Details and Selecting Transactions to Edit or Delete, page 332.

4. Make the necessary changes to transactions using the Pledge Adjust page.

   See Chapter 17, “Entering Commitments,” Entering a Pledge Adjustment Transaction, page 375.

5. Balance, queue, and post the session.

   See Chapter 18, “Processing Commitments,” Queuing Sessions for Posting, page 379 and Chapter 18, “Processing Commitments,” Processing and Posting Sessions, page 381.

Pages Used to Adjust Pledges

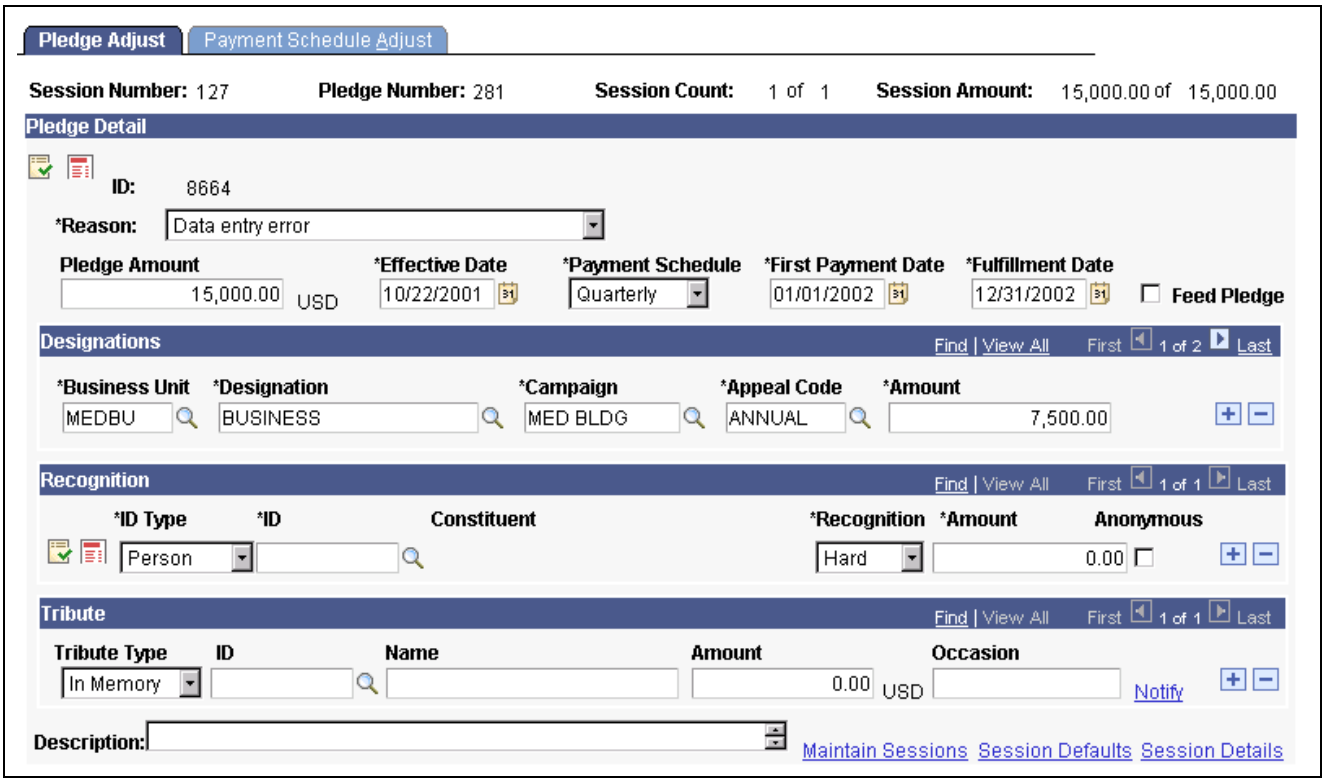
Page Name	Object Name	Navigation	Usage
Pledge Adjust	AV_ADJ_PLEDGE	Contributor Relations, Session Management, Enter Pledges, Pledge Adjustment, Pledge Adjust	Adjust an existing pledge transaction.
Payment Schedule Adjust	AV_PLDG_SCHD	Contributor Relations, Session Management, Enter Pledges, Pledge Adjustment, Payment Schedule Adjust	Adjust an existing pledge payment schedule as part of a transaction adjustment.

See Also

Chapter 17, “Entering Commitments,” Determining a Pledge Payment Schedule Within a Session, page 367

Entering a Pledge Adjustment Transaction

Access the Pledge Adjust page.



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 17, “Entering Commitments,” Entering a Pledge Transaction, page 364

CHAPTER 18

Processing Commitments

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.

Understanding Credit Card Processing

The 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 self-service Involvement for real-time 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.
- Real-time (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 self-service Involvement functionality. 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 21, "Working with Self-Service Involvement," page 471

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 8, "Managing Constituent Data," Searching for People, page 123.

Recognition — Select a type of credit the donor is receiving, such as *Hard, Soft, Vehicle,* 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 the 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. This flag is considered in the acknowledgement process to suppress an automatic acknowledgement. Also, the Anonymous check box on the Giving Profile is selected if any gift a donor makes is anonymous.

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.

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

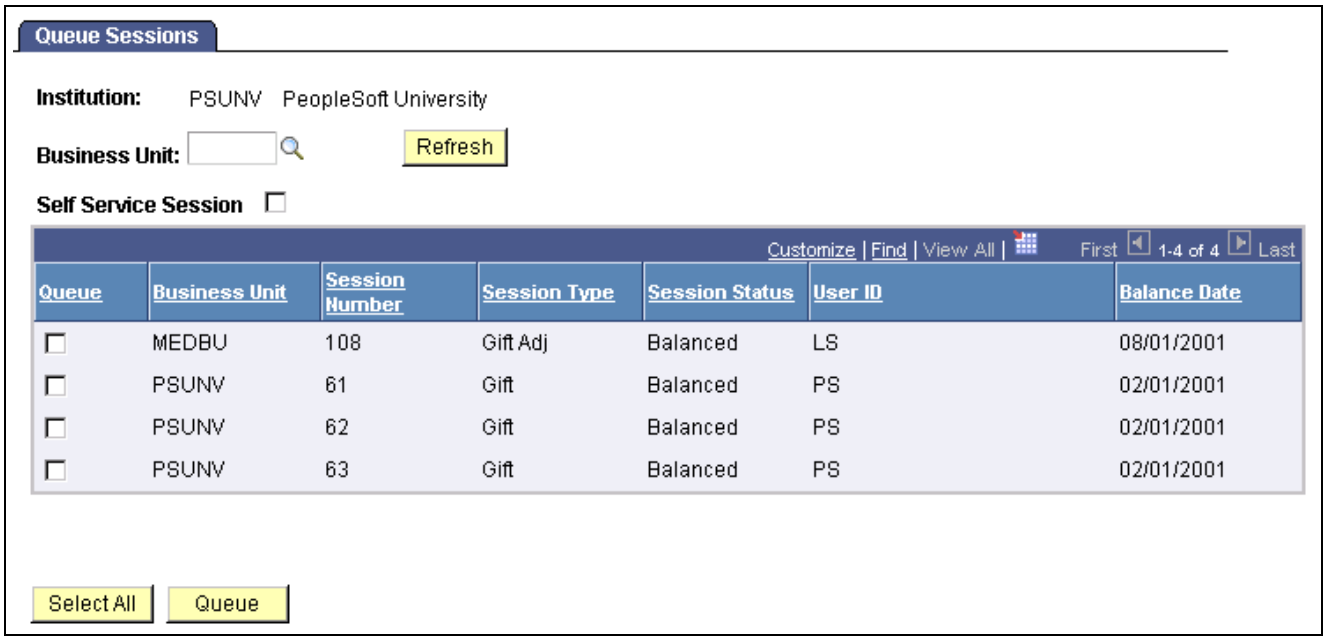
This section discusses how to queue balanced sessions for posting.

Page Used to Queue Sessions for Posting

Page Name	Object Name	Navigation	Usage
Queue Sessions	AV_POST_SESSION	• Contributor Relations, Session Management, Queue Sessions for Posting • Contributor Relations, Session Management, Enter Memberships, Queue Member 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 page

Note. After 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 the system to be posted as journal entries in PeopleSoft Enterprise Financials.

1. The GL Interface process copies the transaction data from the Contributor Relations system into a table called AV_ACCTG_LN.

   In this table the transactions are associated with the appropriate item types in 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 the financial system.

   For example, a gift transaction for 100 USD has a debit of 100 USD to a tender account with a journal set of 0 and a credit of 100 USD to a designation account with a journal set of 1.

Tender	
Debit	Credit
100 USD	

Designation	
Debit	Credit
	100 USD

   If the Feed Pledges check box is selected on the CR Installation page, a pledge transaction for 500 USD has a debit of 500 USD 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 500 USD for the previous pledge has a debit of 500 USD 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
500 USD − Pledge Payment	

Accounts Receivable	
Debit	Credit
500 USD − Pledge	500 USD − Pledge Payment

Designation	
Debit	Credit
	500 USD – Pledge

If a gift or membership transaction that has been posted is adjusted from 1,000 USD to 100 USD, 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 1,000 USD to reverse the original transaction, then debiting the tender account 900 USD for the refund and 100 USD for the new transaction amount. The designation account is adjusted by debiting 1,000 USD to reverse the transaction, then crediting 100 USD for the new transaction amount. Finally, the refund is recorded through a 900 USD 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
	1,000 USD (Gift)
900 USD − Negate Gift	
100 USD − Adjusted Gift	

Clearing Account	
Debit	Credit
	900 USD - Refund

Designation	
Debit	Credit
1,000 USD (Negate Gift)	100 USD (Adjusted Gift)

2. Depending on the version of PeopleSoft Enterprise Financials your institution uses:
   - If your institution uses Financials 8.4 or 8.8, the information in the AV_ACCTG_LN table is sent to Financials via Application Messaging.

     The Journal Generator process is run within Financials to create journal entries.

     See Chapter 20, "Interfacing with PeopleSoft Enterprise Financials," page 457.
   - If your institution uses another version of 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 the Financials system.

See Also

Chapter 7, "Setting Up Commitment Management," Setting Up Item Types, page 89

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.

Note. When posting a zero-amount transaction in a session, the system creates no lines in the AV_ACCTG_LN table and transmits nothing to the financials system. Likewise, when adjusting a transaction to zero, the system creates the necessary reversing entries and transmits them to the financials system. However, it does not create or transmit any new rows representing the zero amount of the adjusted transaction. Therefore, a session that contains only transactions with tenders that allow zero amounts will generate no rows in the AV_ACCTG_LN record.

Understanding the Constituent Accumulators Process

The Constituent Accumulators process builds accumulator tables that summarize data utilized by the Giving Profile and Commitment Summary pages. You can run this process as part of posting any session type via the AVPOST multi-process job, or run it independently through its own run control definition.

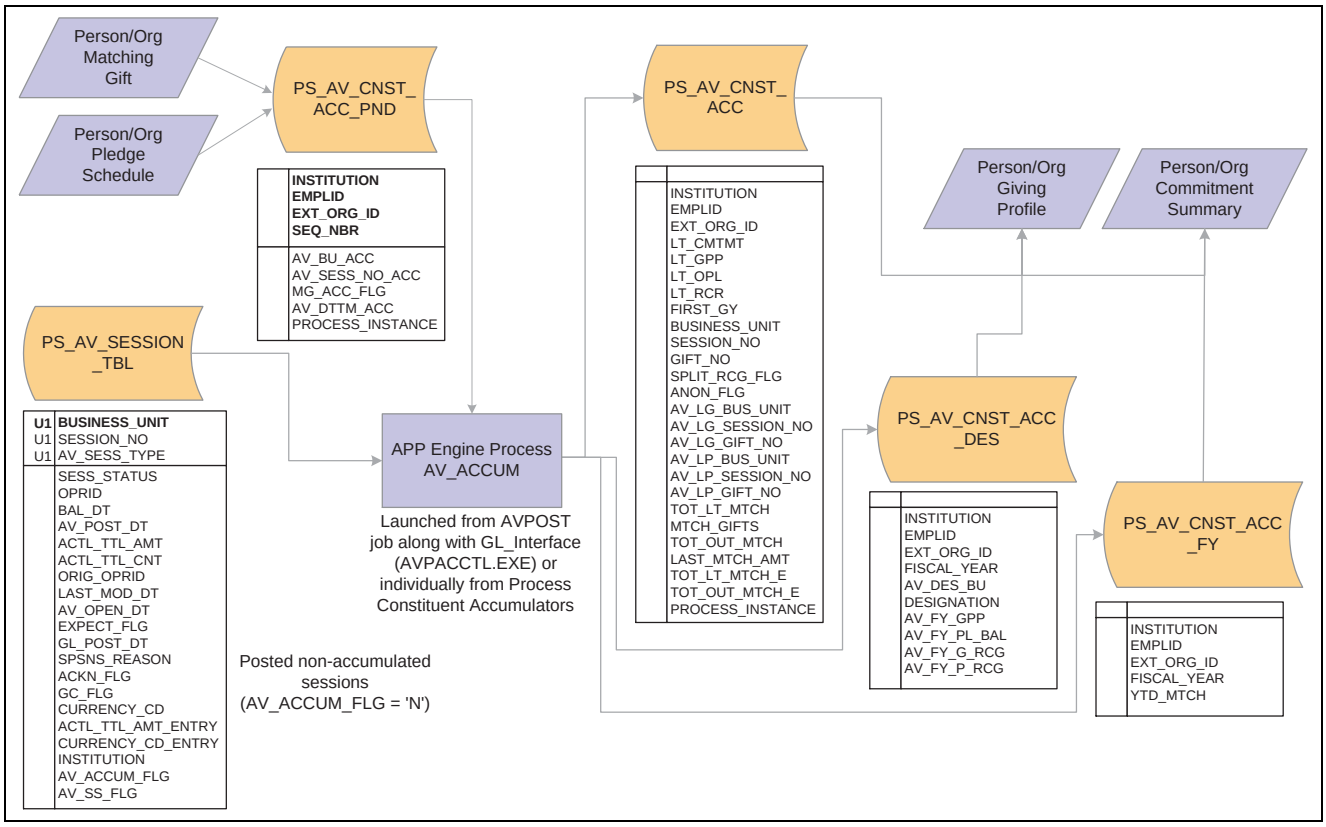
Your institution should decide if the information displayed on the Giving Profile and Commitment Summary pages needs to display the latest posted sessions. If so, the Constituent Accumulators process can be run along with the GL Interface in the AVPOST multi-process job. If not, the Constituent Accumulators 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.

Here is how the process works:

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. After the process runs, the pending accumulation table should be empty, and all posted sessions should be processed.



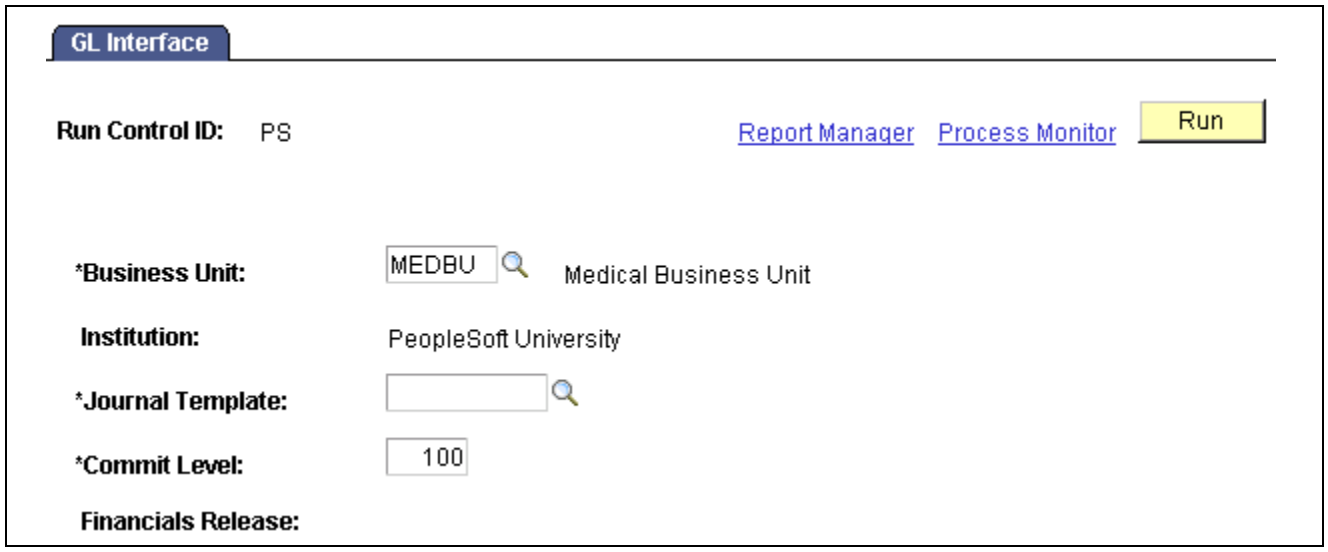
Constituent Accumulators process flow

Pages Used to Process and Post Sessions

Page Name	Object Name	Navigation	Usage
GL Interface (general ledger interface)	AV_RUN_CNTL_GL	Contributor Relations, Session Management, Process Sessions, G/L Interface	Process sessions and prepare them for journal entry in Financials.
GL Interface File Extract (general ledger interface file extract)	AV_RUNCTL_ACTLN	Contributor Relations, Session Management, Process Sessions, G/L Interface File Extract	Manually generate a flat file containing data from AV_ACCTG_LN to be exported to Financials.
Constituent Accumulators	AV_RUNCTL_ACCUM	Contributor Relations, Session Management, Process Sessions, Constituent Accumulators	Run the process that builds accumulator tables for summarizing data on the Giving Profile and Commitment Summary pages.

Running the GL Interface Job (AVPOST and AVPOST2)

Access the GL Interface page.



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 Financials.

See Chapter 7, "Setting Up Commitment Management," Preparing for Session Posting, page 89.

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 Financials 8.4, run the AVPOST job, which completes the AV/GL Post process, creates an extract file for export to Financials, and accumulates constituent totals for the Giving Profile and Commitment Summary pages.

If your institution uses 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 Financials 8.4 database.

Financials subscribes to the published messages in the Contributor Relations database, takes the accounting lines into their AV_ACCTG_LN table, and runs those lines through Journal Generator to create journals. Financials then publishes the updated accounting lines, Contributor Relations subscribes to these lines, and the data published by Financials updates the Contributor Relations AV_ACCTG_LN table.

See Also

Chapter 20, “Interfacing with PeopleSoft Enterprise Financials,” Running the AVPOST2 Job, page 464

Running the GL Interface File Extract COBOL Process (AVPACCTL)

Access the GL Interface File Extract page.



GL Interface File Extract page

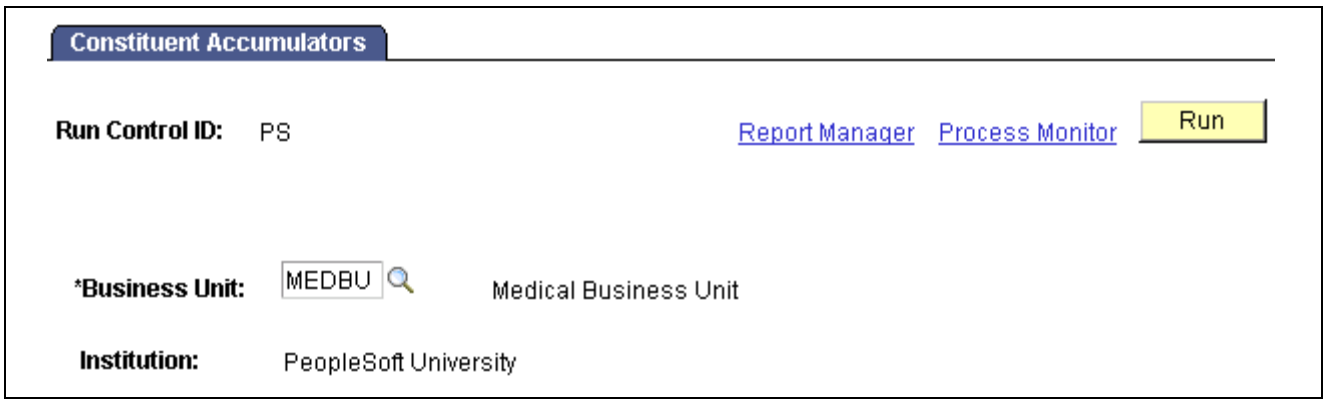
If your institution uses a version of Financials earlier than 8.4, or uses an external Financials system, run this process if the AV_POST job failed or if you chose to run only the AVPACCTL process rather than the complete GL Interface job.

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 Process (AVPOST)

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 Contributor Relations are set up in Financials.

See Also

PeopleSoft General Ledger 8.8 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

After 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. 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

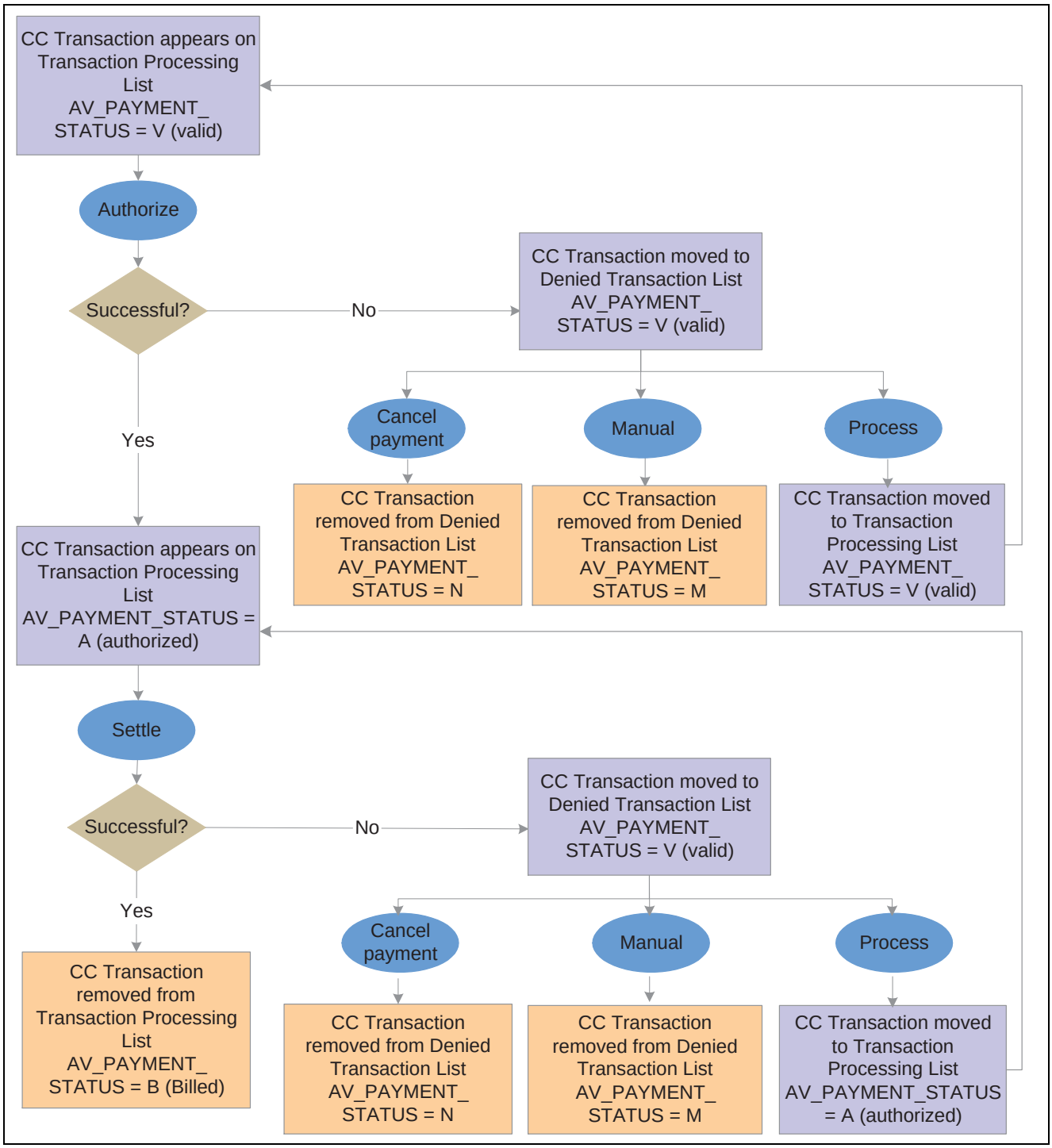
  Issues a refund to a customer's credit card account after an adjusted gift or membership.

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
V (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 *V* 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 *V*.
A (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 *A*. The prerequisite to settle a gift or membership transaction is to have an AV_PAYMENT_STATUS value of *A*.
B (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 *B*. After a transaction is settled, it is considered complete and no longer shows up on the EP Transaction Processing − Filter Options page.
P (pending credit)	After a gift or membership transaction has been adjusted, after 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 *P* for this transaction. The transaction is ready to be credited.
C (refunded)	A transaction has an AV_PAYMENT_STATUS value of *C* as a successful result of selecting the transactions after filtering on a Transaction Requested value of *Credit* on the EP Processing Transaction − Filter Options page and processing these transactions through a third-party credit card processor.
D (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 *D* for this transaction. Denied transactions are then ready to be viewed and selected from the EP Denied Transactions page.

Status Value	Definition
N (cancelled)	A transaction has an AV_PAYMENT_STATUS value of *N* 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.
M (manual)	A transaction has an AV_PAYMENT_STATUS value of *M* 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.



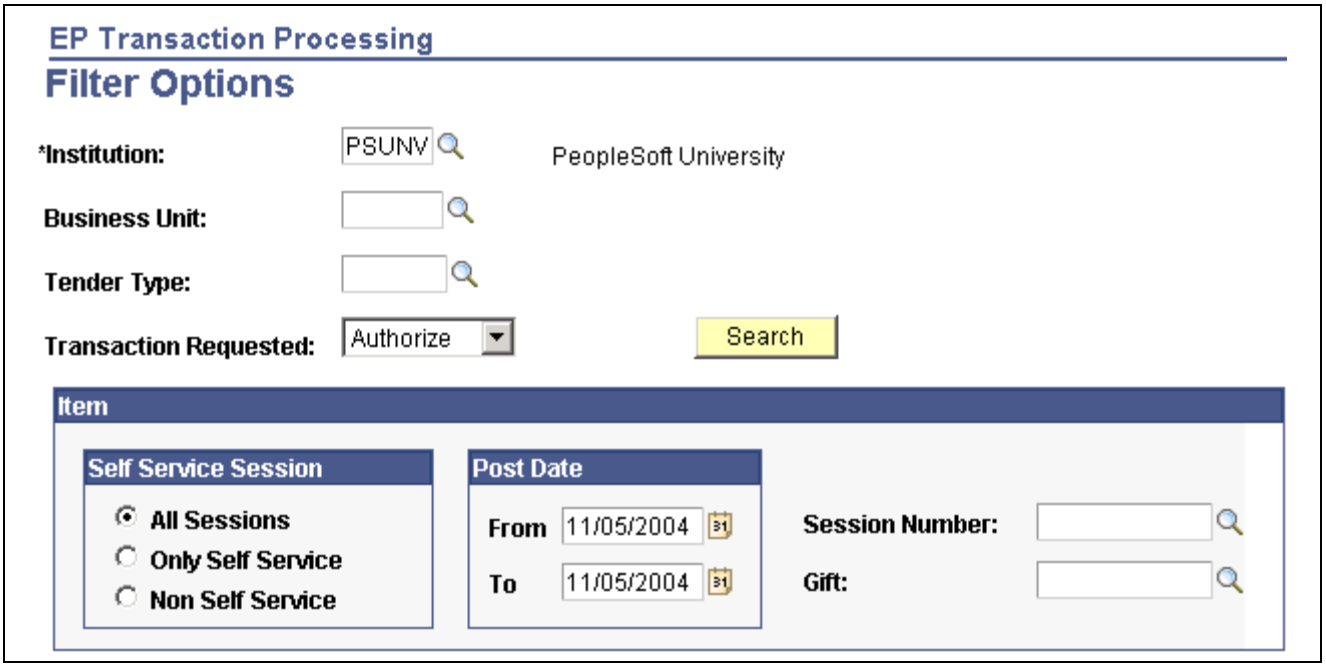
Summary of electronic payment transaction processing

Pages Used to Process Credit Card Transactions

Page Name	Object Name	Navigation	Usage
EP Transaction Processing – Filter Options	AV_EP_FLTR	Contributor Relations, Session Management, Process Electronic Payments, EP Transaction Processing (to select gifts)	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 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:

All Sessions: to select gifts and memberships made through both Contributor Relations and Involvement self-service pages.

Only Self Service: to select gifts made through the self-service Make a Donation pages only.

Non Self Service: to select gifts made through 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 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 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

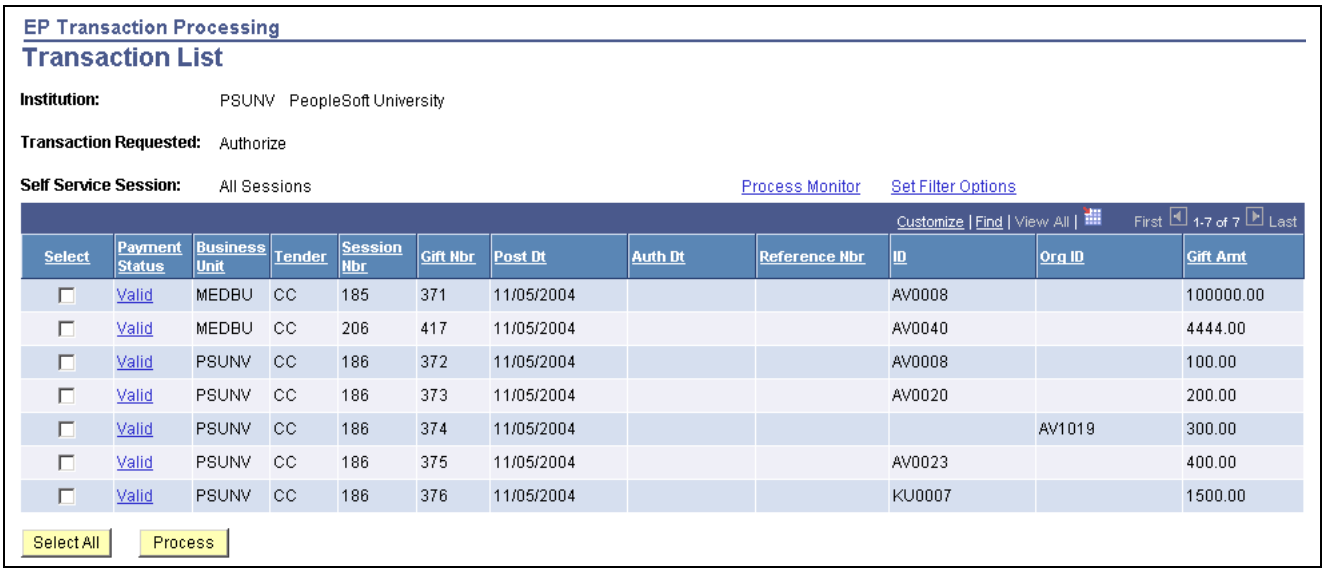
Chapter 18, “Processing Commitments,” Authorizing Gift and Membership Transactions, page 394

Chapter 18, “Processing Commitments,” Settling Gift and Membership Transactions, page 396

Chapter 17, “Entering Commitments,” Adjusting Gift and Membership Credit Card Payments, page 356

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

Customize | Find | View All | First 1-7 of 7 Last

Select	Payment Status	Business Unit	Tender	Session Nbr	Gift Nbr	Post Dt	Auth Dt	Reference Nbr	ID	Org ID	Gift Amt
☐	Valid	MEDBU	CC	185	371	11/05/2004			AV0008		100000.00
☐	Valid	MEDBU	CC	206	417	11/05/2004			AV0040		4444.00
☐	Valid	PSUNV	CC	186	372	11/05/2004			AV0008		100.00
☐	Valid	PSUNV	CC	186	373	11/05/2004			AV0020		200.00
☐	Valid	PSUNV	CC	186	374	11/05/2004				AV1019	300.00
☐	Valid	PSUNV	CC	186	375	11/05/2004			AV0023		400.00
☐	Valid	PSUNV	CC	186	376	11/05/2004			KU0007		1500.00

Select All Process

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 18, "Processing Commitments," Understanding Credit Card Transaction Processing, page 389.

Auth Dt (authorization date) — When the transaction is authorized, the system populates this field.

Reference Nbr (reference number) — When 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.

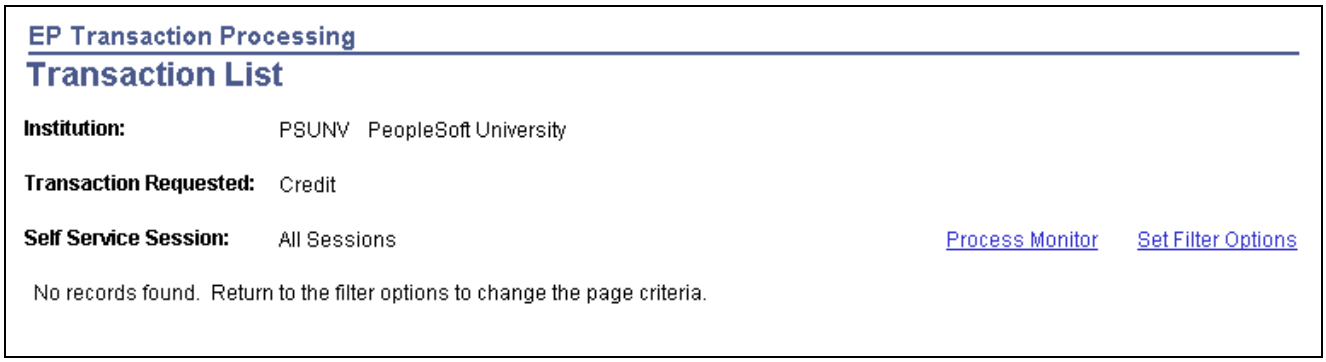
Mbr Dues (membership dues) — If the transaction is a membership, displays the amount of the membership credit card transaction.

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 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.

After 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 18, "Processing Commitments," Working with Denied Credit Card Transactions, page 397

Chapter 17, "Entering Commitments," Adjusting Gift and Membership Credit Card Payments, page 356

Chapter 18, "Processing Commitments," Selecting Gift and Membership Transactions for Processing, page 393

Settling Gift and Membership Transactions

After 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.

After 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 18, "Processing Commitments," Selecting Gift and Membership Transactions for Processing, page 393

Chapter 18, "Processing Commitments," Authorizing Gift and Membership Transactions, page 394

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.*

After the system successfully authorizes and settles a transaction in a single succession, its status becomes *B.*

See Also

Chapter 18, "Processing Commitments," Selecting Gift and Membership Transactions for Processing, page 393

Chapter 18, "Processing Commitments," Authorizing Gift and Membership Transactions, page 394

Chapter 18, "Processing Commitments," Settling Gift and Membership Transactions, page 396

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 the 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.*

You can use the EP Denied Transactions − Filter Options and EP Denied Transactions − Transaction List pages to perform the following functions:

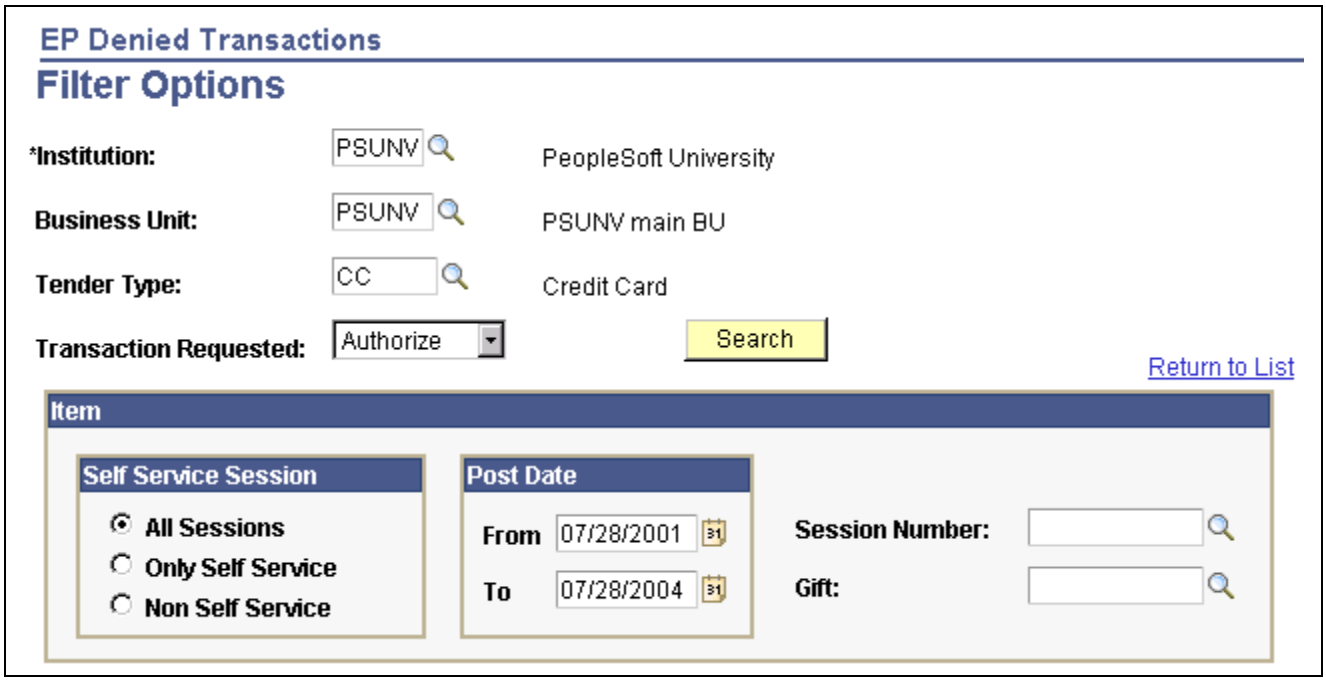
- Retry the authorization, process the settlement, authorize and settle, or process a credit.
- Handle the transaction manually.
- Cancel the payment of the transaction.

Pages Used to Work with Denied Credit Card Transactions

Page Name	Object Name	Navigation	Usage
EP Denied Transactions − Filter Options	AV_EP_FLTR	• Contributor Relations, Session Management, Process Electronic Payments, EP Denied Transactions • Contributor Relations, Session Management, Process Electronic Payments, EP Denied Member 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 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 the third-party credit card processor denied.

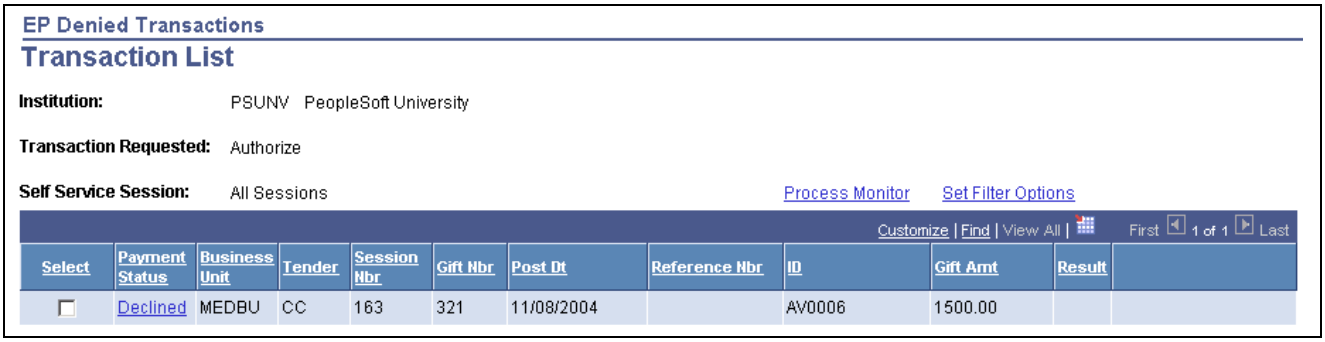
The fields on this page are the same as those on the EP Transaction Processing − Filter Options page. For denied gift or membership transactions, however, the Transaction Requested value you select is the stage at which the gift or membership transaction is denied: during authorization, settlement, combined authorization/settlement, or credit.

See Also

Chapter 18, "Processing Commitments," Selecting Gift and Membership Transactions for Processing, page 393

Authorizing and Settling Denied Gift and Membership Transactions

Access the EP Denied Transactions − Transaction List page.


EP Denied Transactions

Transaction List

Institution: PSUNV PeopleSoft University

Transaction Requested: Authorize

Self Service Session: All Sessions Process Monitor Set Filter Options

Customize | Find | 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
☐	Declined	MEDBU	CC	163	321	11/08/2004		AV0006	1500.00	

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 the third-party credit card processor directly to resolve the transaction. Denied transactions dealt with manually receive a status of *M*.

Note. When 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*. When 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 18, “Processing Commitments,” Authorizing Gift and Membership Transactions, page 394

Chapter 18, “Processing Commitments,” Settling Gift and Membership Transactions, page 396

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. 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:

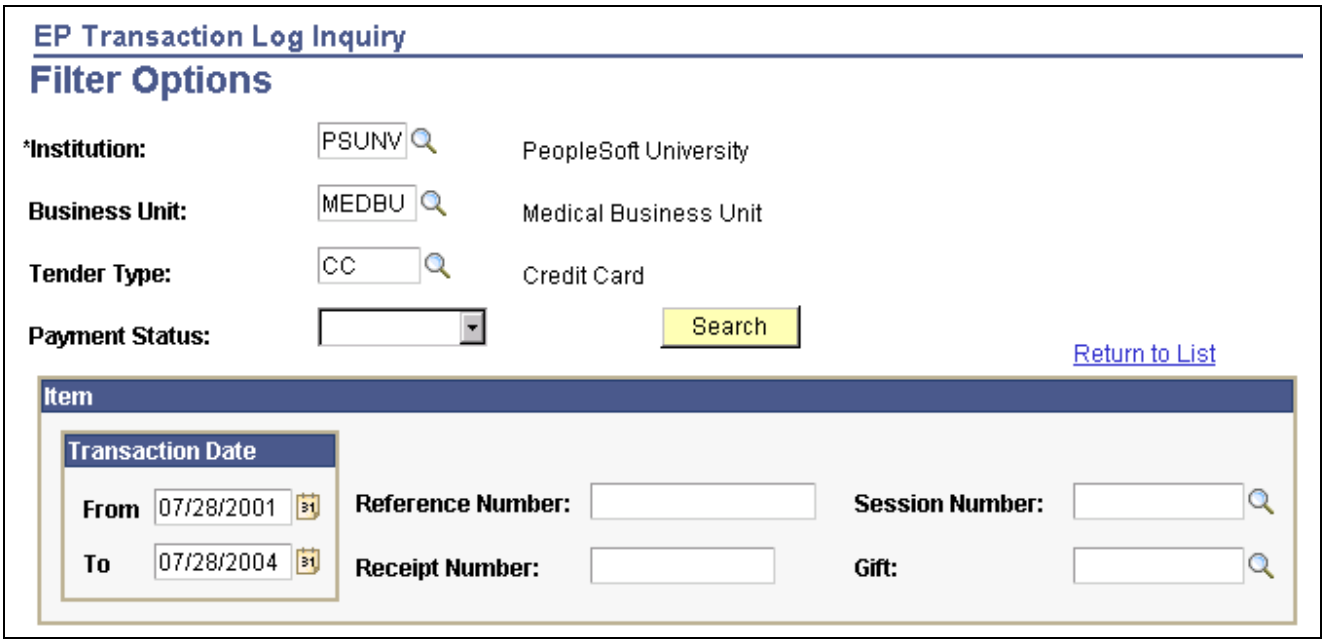
- Select gift and membership transactions for review.
- Review gift and membership transactions.

Pages Used to Review Credit Card Activity

Page Name	Object Name	Navigation	Usage
EP Transaction Log Inquiry − Filter Options	AV_EP_LOG_FLTR	Contributor Relations, Session Management, Process Electronic Payments, 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 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.

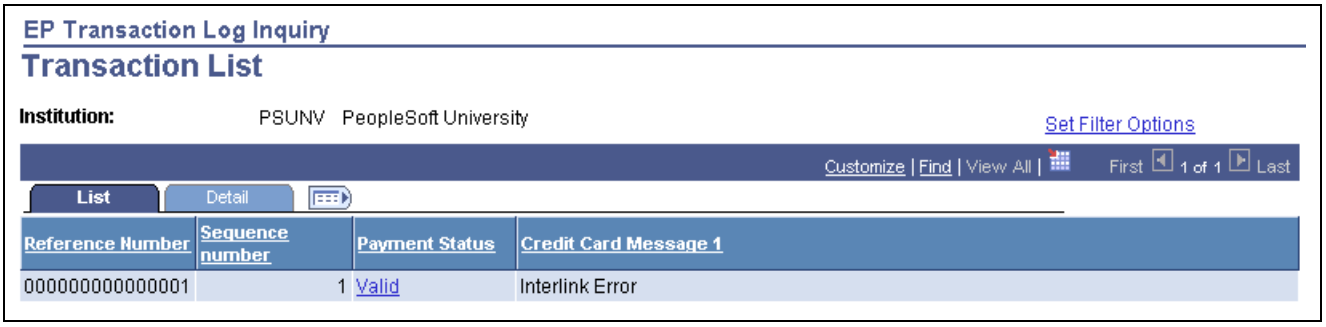
Use this page to filter any gift and membership transactions that have any status and are at any point in the credit card process. You can retrieve transaction details for any time period by entering a Transaction Date range. To review all transactions associated with a gift or membership, enter its 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 18, "Processing Commitments," Selecting Gift and Membership Transactions for Processing, page 393

Reviewing Gift and Membership Transactions

Access the EP Transaction Log Inquiry − Transaction List.



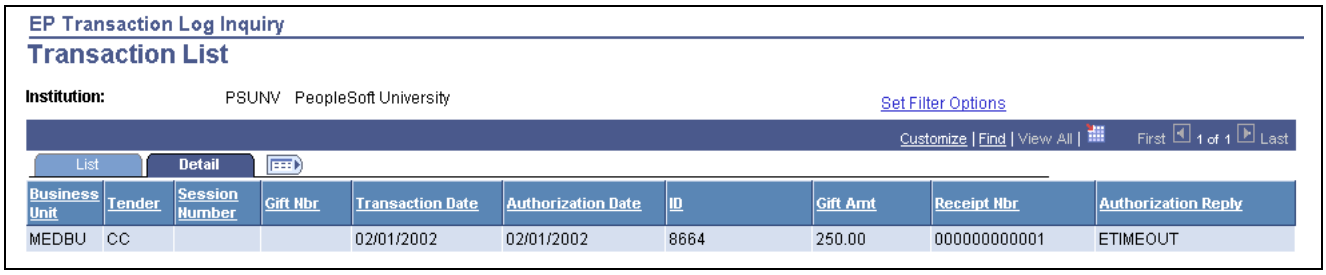
EP Transaction Log Inquiry - Transaction List page: List tab

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.

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 the third-party credit card processor.


EP Transaction Log Inquiry

Transaction List

Institution: PSUNV PeopleSoft University

Set Filter Options

Customize | Find | View All | First 1 of 1 Last

List Detail

Business Unit	Tender	Session Number	Gift Nbr	Transaction Date	Authorization Date	ID	Gift Amt	Receipt Nbr	Authorization Reply
MEDBU	CC			02/01/2002	02/01/2002	8664	250.00	000000000001	ETIMEOUT

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 the 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

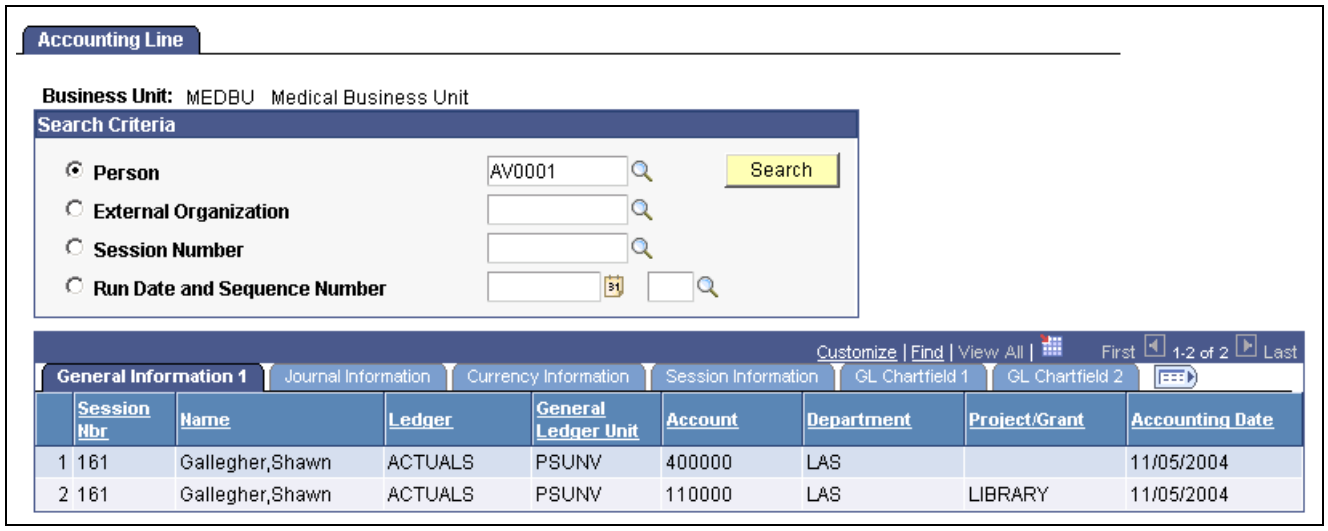
This section discusses how to view generated accounting lines. The system generates accounting lines through the GL Interface process.

Page Used to View Accounting Lines

Page Name	Object Name	Navigation	Usage
Accounting Line	AV_ACCTG_LN_INQ	Contributor Relations, Session Management, Supervise Sessions, Accounting Line Summary	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 page

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 Enterprise Financials 8.4 and 8.8. The GL Interface process currently populates the following fields:

- Fund
- Budget Reference
- Chartfield 1
- Chartfield 2
- Chartfield 3

See Also

Chapter 20, “Interfacing with PeopleSoft Enterprise Financials,” Viewing Accounting Lines, page 467

Chapter 20, “Interfacing with PeopleSoft Enterprise Financials,” page 457

Viewing Suspended Sessions

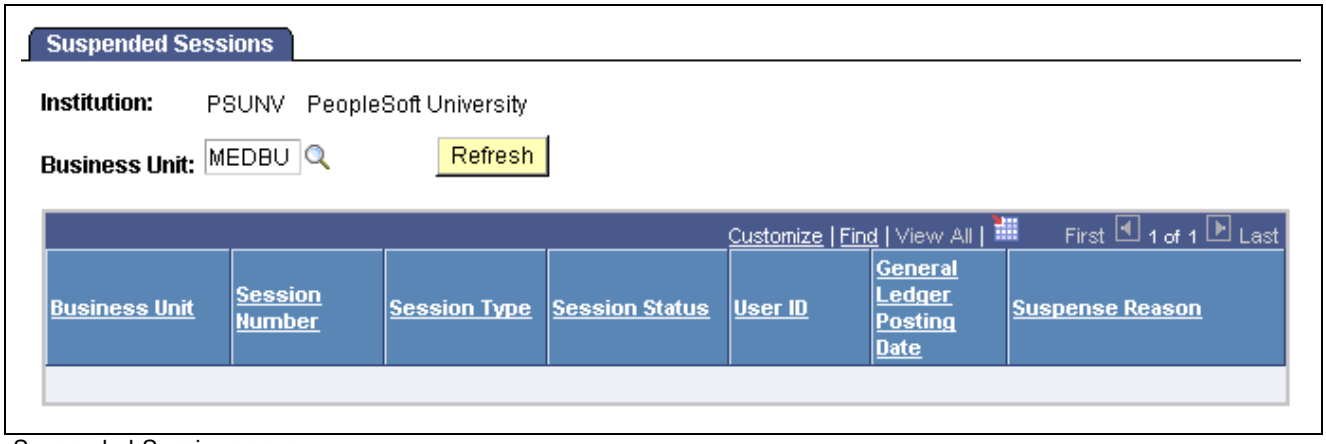
This section discusses how to view information about suspended sessions.

Page Used to View Suspended Sessions

Page Name	Object Name	Navigation	Usage
Suspended Sessions	AV_SPSN_SESSION	• Contributor Relations, Session Management, Supervise Sessions, Suspended Sessions • Contributor Relations, Session Management, Supervise Sessions, Membership Sessions, Suspended Membership Sessions	View information about sessions that were suspended during the posting process.

Viewing Suspended Session Information

Access the Suspended Sessions page.



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 *Institution*
If the Gift Total does not equal zero after subtracting each of the designation/recognition totals for the gift	Gift Amt of Gift *Number* 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 *Number* 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 *Number* 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 *Number* 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 *Number* 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
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

Reason	Message
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:

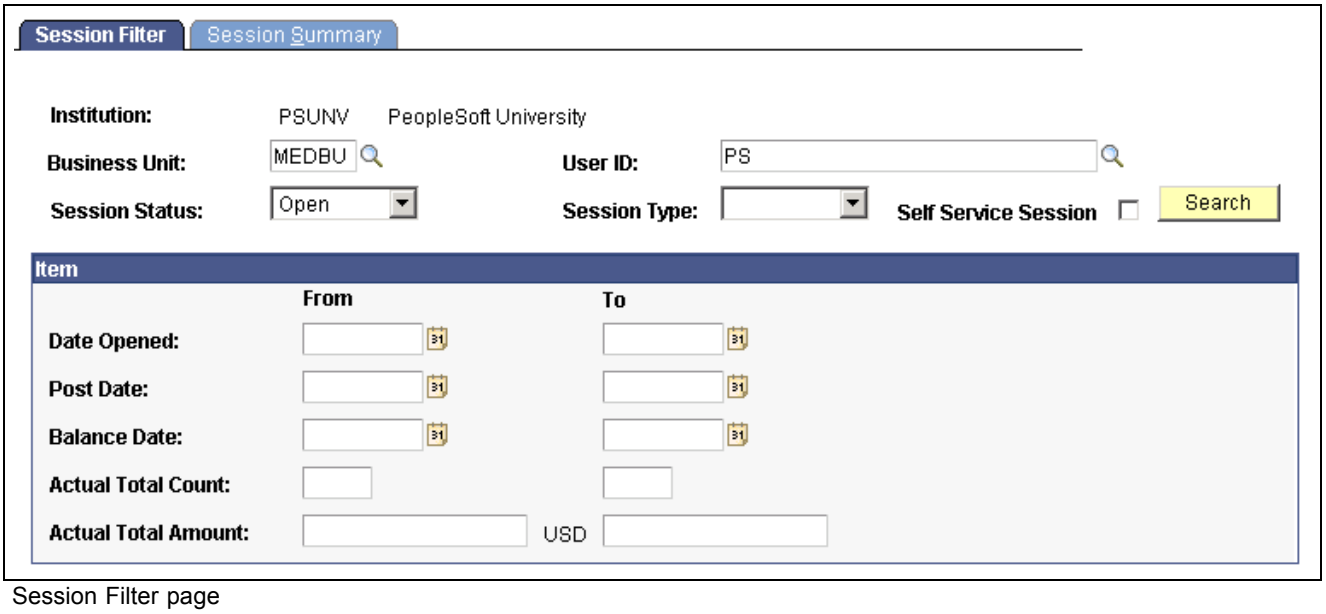
- Filter sessions.
- View a session summary.
- Transfer sessions.
- Re-open and edit expected counts and amounts for sessions.

Pages Used to View Information About and Transfer Sessions

Page Name	Object Name	Navigation	Usage
Session Filter	AV_SESS_FLTR	• Contributor Relations, Session Management, Supervise Sessions, Session Summary, Session Filter • Contributor Relations, Session Management, Supervise Sessions, Membership Sessions, Membership Session Summary, Session Filter	Select criteria to narrow the number of sessions you view on the Session Summary page.
Session Summary	AV_SESS_SMRY	• Contributor Relations, Session Management, Supervise Sessions, Session Summary, Session Summary • Contributor Relations, Session Management, Supervise Sessions, Membership Sessions, Membership 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 page

Business Unit Enter the business unit for which to view session information.

Session Status Select a valid session status, such as *Open, Balanced, Posted, Queued,* or *Suspense.* If you do not specify a session status, the Session Summary page displays all sessions, regardless of session status.

Field values 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.

User ID Displays the ID of the person who controls the session.

Note. This field is only available for selection if you are a gift and pledge supervisor; otherwise, your user ID appears here.

Session Type Select a valid session type, such as *Gift, Pledge, Gift Adjustment, Pledge Adjustment, Member,* or *Member Adjustment.* If you do not specify a session type, the Session Summary page displays all sessions, regardless of session type.

Session 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.

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 during the GL Interface process. A balance date range is the date range in which sessions were balanced in the 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.

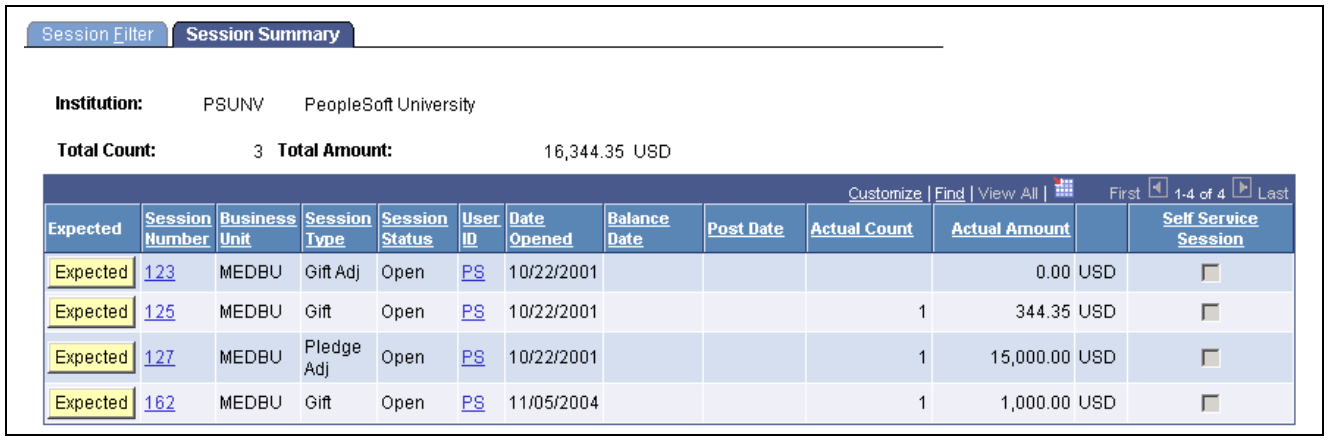
Actual Total Count and **Actual Total Amount** Enter an actual total count and actual total amount range. Enter the lowest count or amount in the From field, and the highest count or amount in the To field. An actual total count range specifies the number of transactions contained in a session. The actual 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 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 18, "Processing Commitments," Re-Opening and Editing Expected Counts and Amounts for Sessions, page 410.

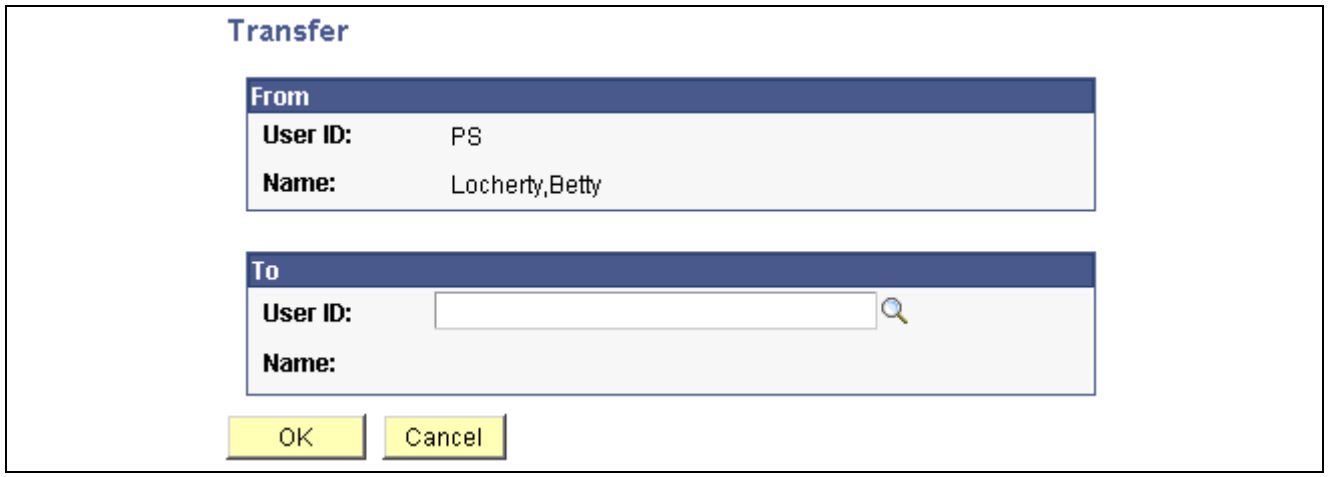
Self Service Session Indicates the gifts in the session that were created as a result of online giving.

See Also

Chapter 17, "Entering Commitments," Initializing and Balancing the Session, page 328

Transferring Sessions

Access the Transfer page.



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, when 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 Set Up SACR, Product Related, Contributor Relations, CR Common Definitions, Resources, 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 Set Up SACR, Product Related, Contributor Relations, CR Common Definitions, Resources, 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 Contributor Relations, Session Management, 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 Contributor Relations, Session Management, Enter Gifts, Maintain Gift Sessions, or Contributor Relations, Session Management, Enter Pledges, Maintain Pledge Sessions, or Contributor Relations, Session Management, Enter Memberships, Maintain Membership Sessions.

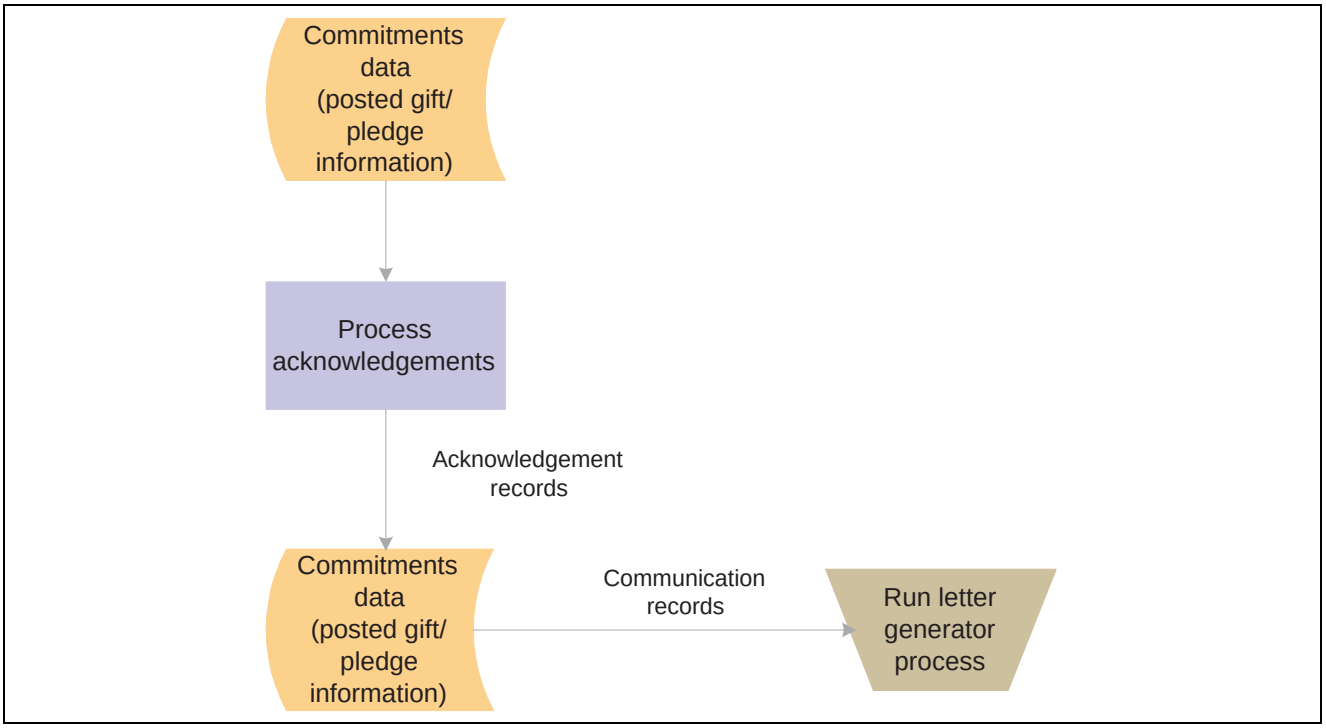
Note. When the fields are edited and saved, you would need to perform Steps 3 and 4 again to re-open the session for editing.

Managing the Acknowledgement Process

In Contributor Relations, acknowledgement letters and receipts are either queued automatically based on parameters you define when you set up your system or queued manually. After 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. After the communications record exists, you can run the Letter Generator process (CCLTRGEN). 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 1,000 USD:

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 1,000 USD. Depending on how you set up acknowledgement rules, they may also receive a joint acknowledgement for 1,000 USD.

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 500 USD. Depending on how you set up acknowledgement rules they may also receive separate acknowledgement letters for 500 USD 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 1,000 USD. 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 1,000 USD.

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 1,000 USD. The donor may also receive an acknowledgement letter for 1,000 USD. 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 1,000 USD indicating zero charitable amount. No joint communications are created.

See Also

PeopleSoft Enterprise Campus Community Fundamentals 8.9 PeopleBook, "Managing Communications," Understanding Joint Communications

Chapter 2, "Setting Up Your Contributor Relations Framework," Setting Up Institution Defaults, page 7

Processing Acknowledgement Letters

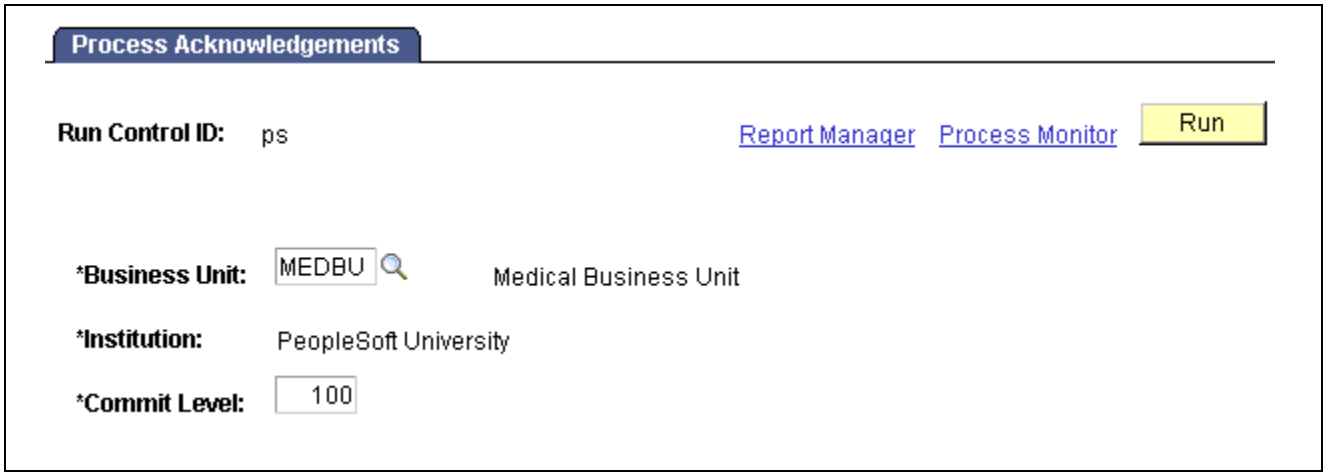
This section discusses how to automatically process acknowledgment letters.

Page Used to Process Acknowledgement Letters

Page Name	Object Name	Navigation	Usage
Process Acknowledgement	AV_RUNCTL_ACKNLDG	Contributor Relations, Session Management, Acknowledgements, Process Acknowledgements	Process the acknowledgement letters that are queued automatically based on the setup parameters you set for acknowledgements.

Processing Acknowledgements Automatically Using a COBOL Process (AVPACKNL)

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 AVPACKNL process at user-defined intervals.

Generating Acknowledgement Letters

Access the Letter Generation page (Contributor Relations, Communications, Process Communications, Letter Generation).

Contributor Relations uses Campus Community's letter generation process to generate acknowledgement letters when they've been processed.

See *PeopleSoft Enterprise Campus Community Fundamentals 8.9 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:

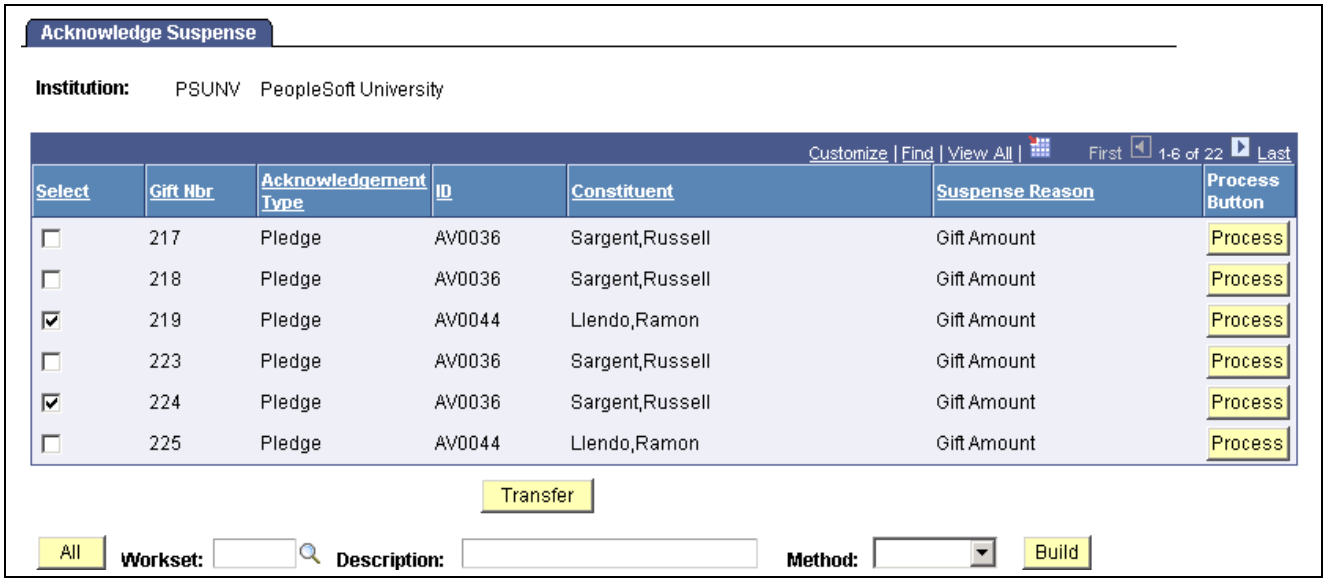
- View acknowledgements in suspense.
- View acknowledgement details.
- Transfer an acknowledgement.
- View acknowledgement lists.

Pages Used to Work with Manually Generated Acknowledgements

Page Name	Object Name	Navigation	Usage
Acknowledge Suspense	AV_ACKNLDG_SPSNS	Contributor Relations, Session Management, Acknowledgements, 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 List	AV_ACKNLDG_LIST	Contributor Relations, Session Management, Acknowledgements, 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.
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.

Viewing Acknowledgements in Suspense

Access the Acknowledge Suspense page.



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 50 USD) 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.

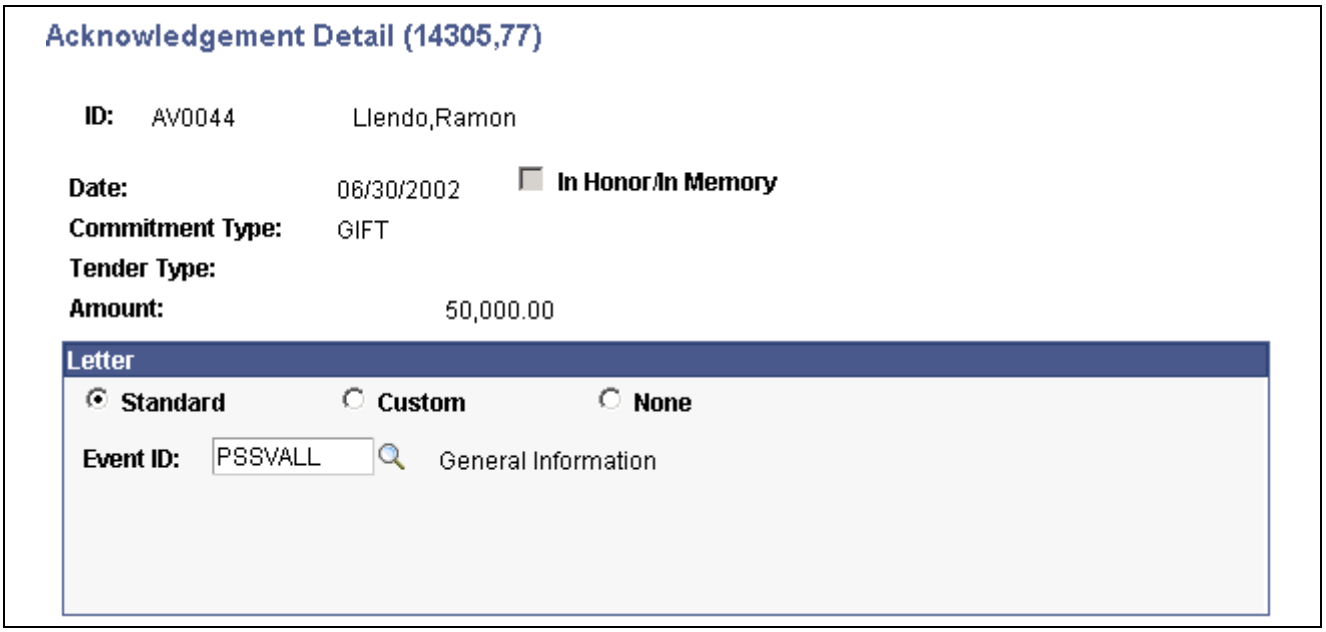
You can build a workset from this page.

See Also

Chapter 3, "General Functions Used Throughout the System," Building a Workset From a Page in the System, page 21

Viewing Acknowledgement Details

Access the Acknowledgement Detail page.



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.

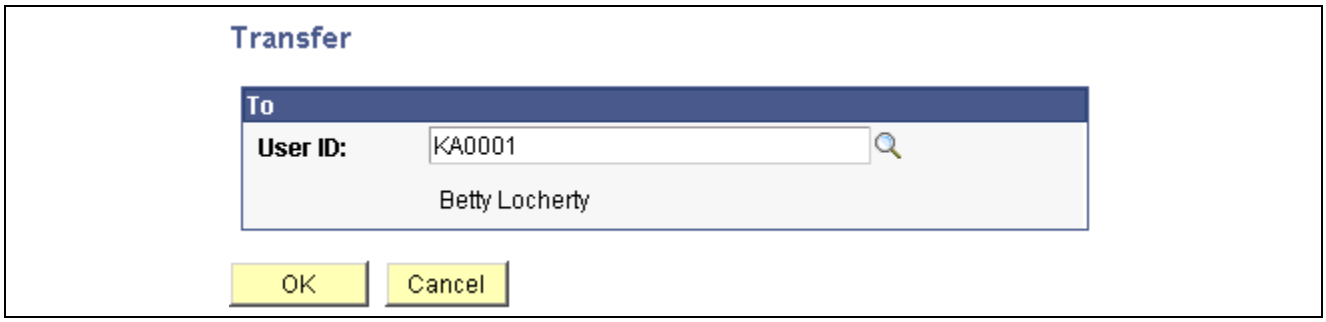
Custom If selected, indicates that you will generate a custom acknowledgement letter for this commitment. You are prompted to select an event ID. In addition, a text box displays where you can type comments about the custom letter that you are going to create for the donor. You can view these notes when 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 the 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 for acknowledgements.

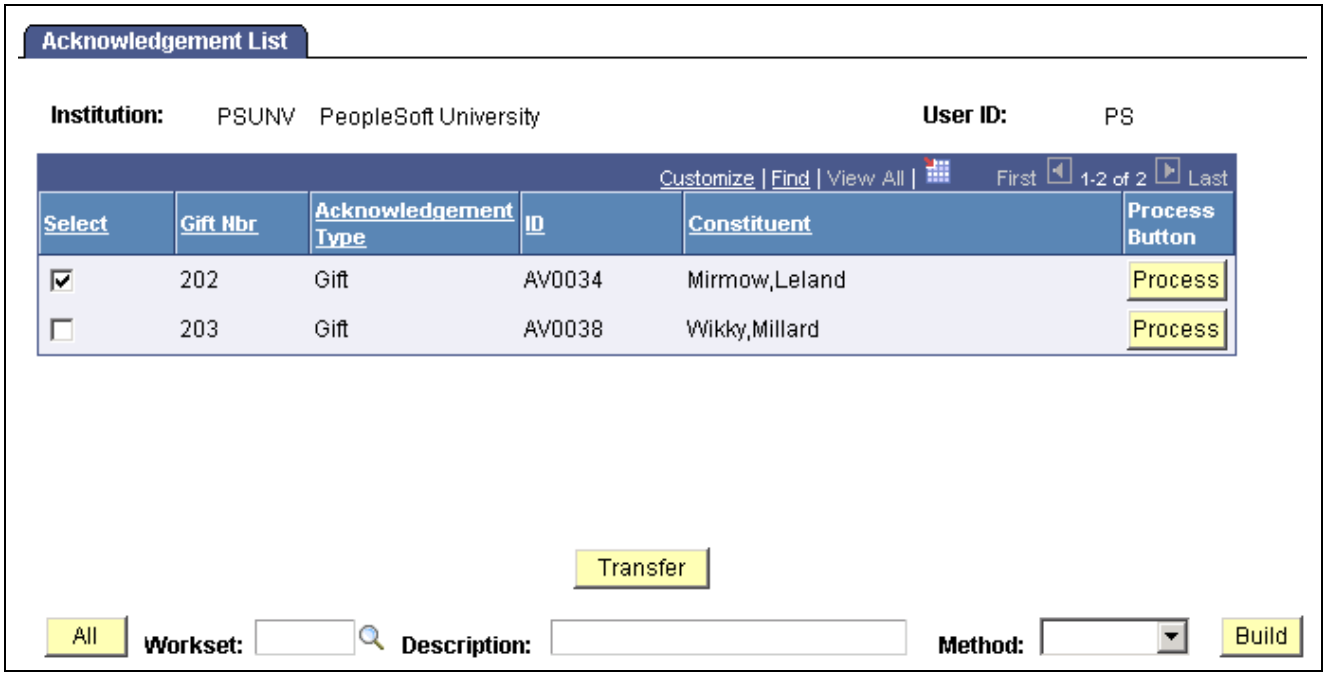


Transfer page

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 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 21

Managing Joint Communications

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 the 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 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. After the communication record exists, you can run the Letter Generator.

Note. The Joint Communications feature expands upon the functionality found in 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 Enterprise Campus Community Fundamentals 8.9 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, 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 500 USD is made to the institution. The expected and received match is 1,000 USD.

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 500 USD is made to the institution. The system expects a match of 1,000, USD but receives a match of 1,300 CAD. 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 500 CAD 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 500 EUR is made to the institution. A matching gift of 1,000 EUR 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

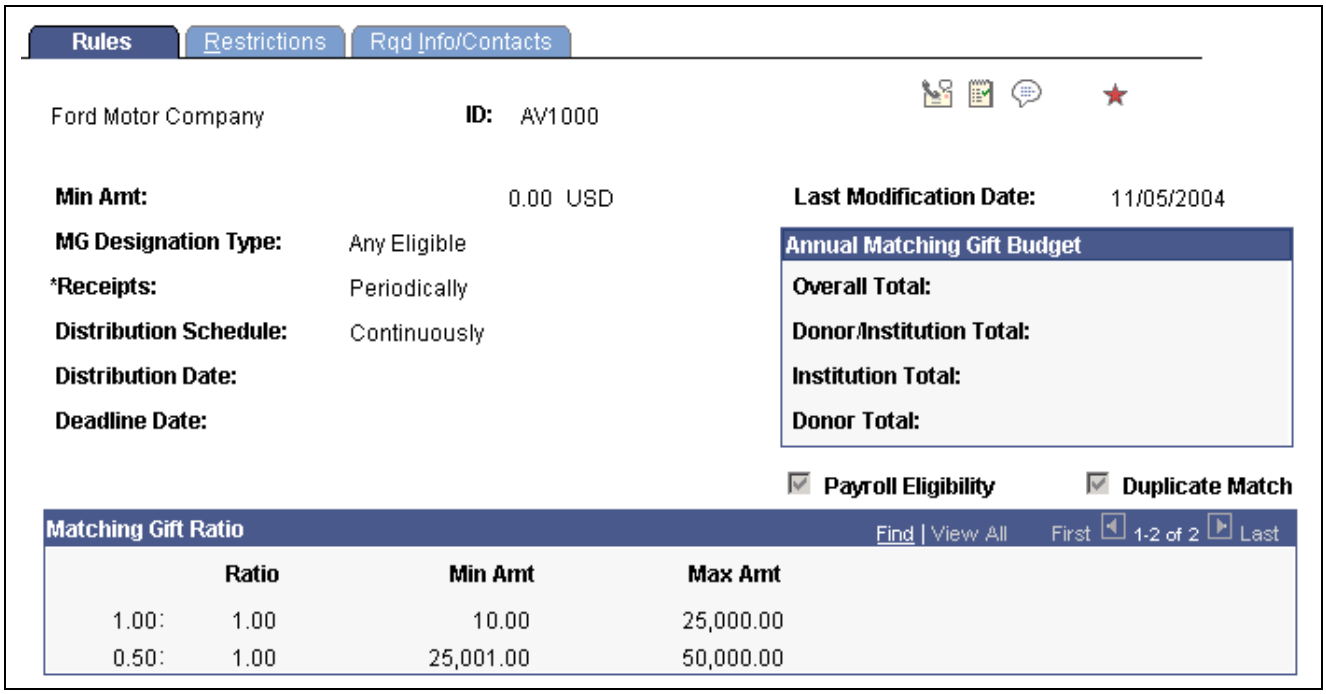
Page Name	Object Name	Navigation	Usage
Rules	AV_MTCH_RULES_INQ	• Contributor Relations, Session Management, Matching Gifts, Matching Rules Details, Rules • Contributor Relations, Constituent Information, External Organizations, Matching Gift Rules, View Matching Rules, Rules • Contributor Relations, Session Management, Matching Gifts, View Matching Rules - Workset, Rules	View information about an organization's match amount, ratios, and budget rules.

Page Name	Object Name	Navigation	Usage
Restrictions	AV_MTCH_RULES2_INQ	• Contributor Relations, Session Management, Matching Gifts, Matching Rules Details, Restrictions • Contributor Relations, Constituent Information, External Organizations, Matching Gift Rules, View Matching Rules, Restrictions • Contributor Relations, Session Management, Matching Gifts, View Matching Rules - Workset, Restrictions	View 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 (required information/contacts)	AV_MTCH_RULES3_INQ	• Contributor Relations, Session Management, Matching Gifts, Matching Rules Details, Rqd Info/Contacts • Contributor Relations, Constituent Information, External Organizations, Matching Gift Rules, View Matching Rules, Rqd Info/Contacts • Contributor Relations, Session Management, Matching Gifts, View Matching Rules - Workset, 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	Contributor Relations, Session Management, Matching Gifts, Person Matching Gift	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	Contributor Relations, Session Management, Matching Gifts, 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	Contributor Relations, Analyze Giving History, Person Giving Summaries, Person Matching Gifts	View information about donors' gifts that are matched by external organizations.
Ext Org Matching Gift (external organization matching gift)	AV_MTCH_O_INQ	Contributor Relations, Analyze Giving History, Organization Giving Summaries, 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 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.

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.

Annual Matching Gift Budget

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.

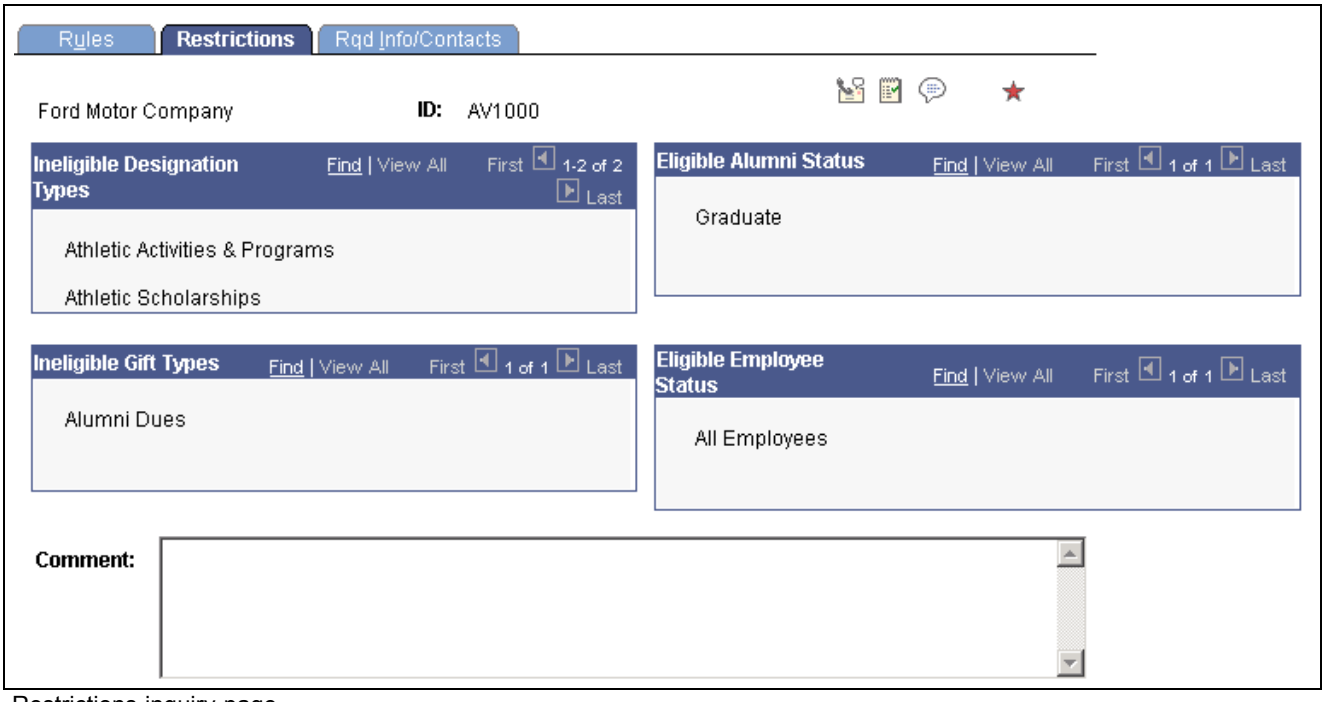
Matching Gift Ratio

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.



Restrictions inquiry page

Ineligible Designation Types Displays the designation types that are not eligible for an organization's matching gift program.

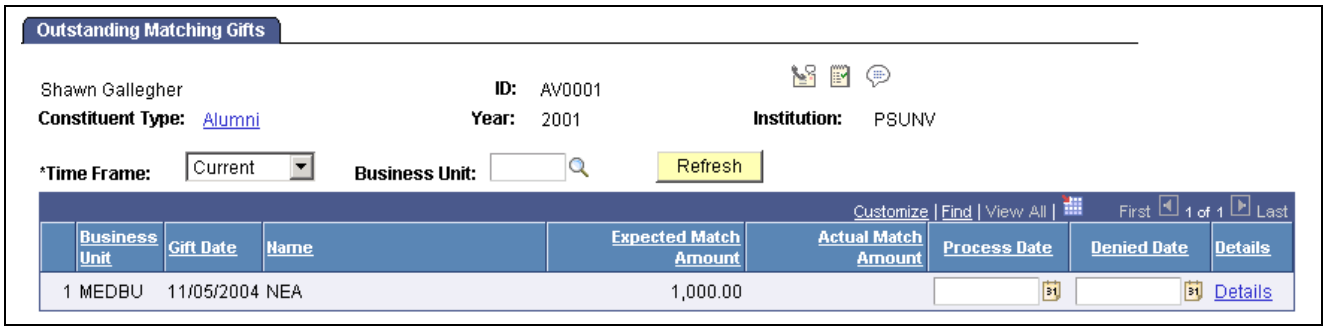
Ineligible Gift Types Displays the certain gift types that the organization will not match

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 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.

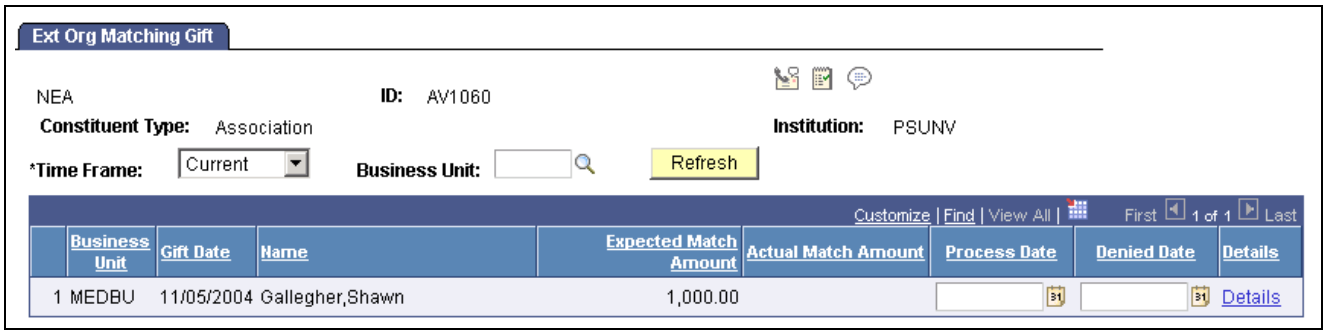
Process Date Displays the date the matching gift form was submitted to the matching gift organization.

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 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.

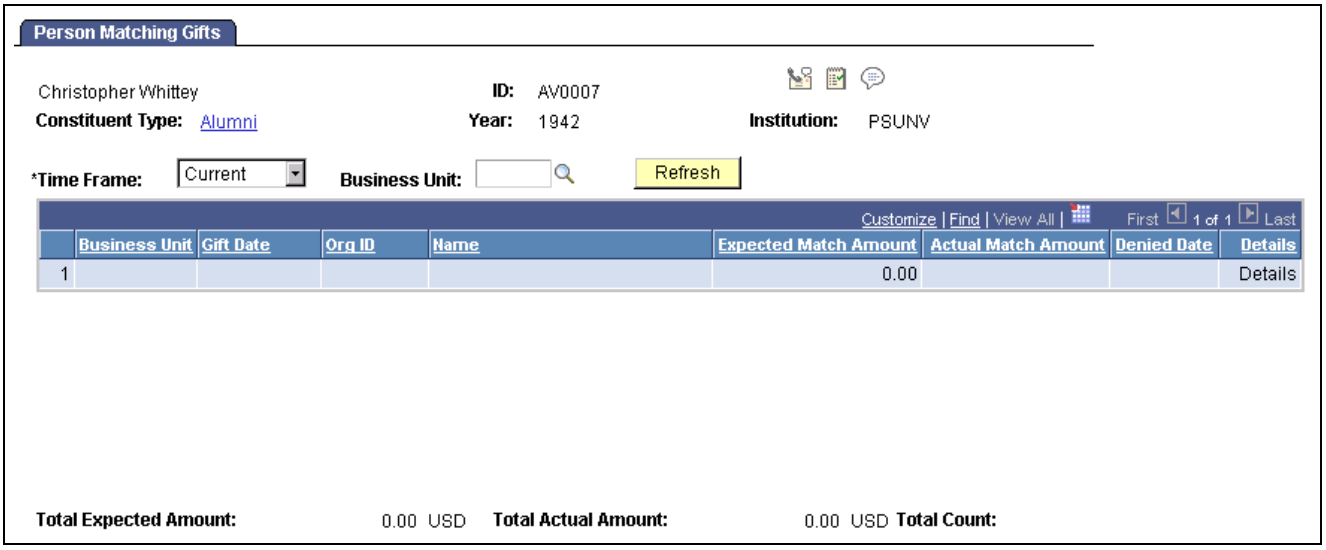
Process Date The date on which the matching gift is processed.

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 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 18, "Processing Commitments," Viewing Expected Matching Gifts, page 426

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 18, “Processing Commitments,” Viewing Matching Gifts for People, page 427.

Managing Giving Clubs

This section discusses how to:

- Manually generate giving club memberships.
- Generating 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.

When 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.

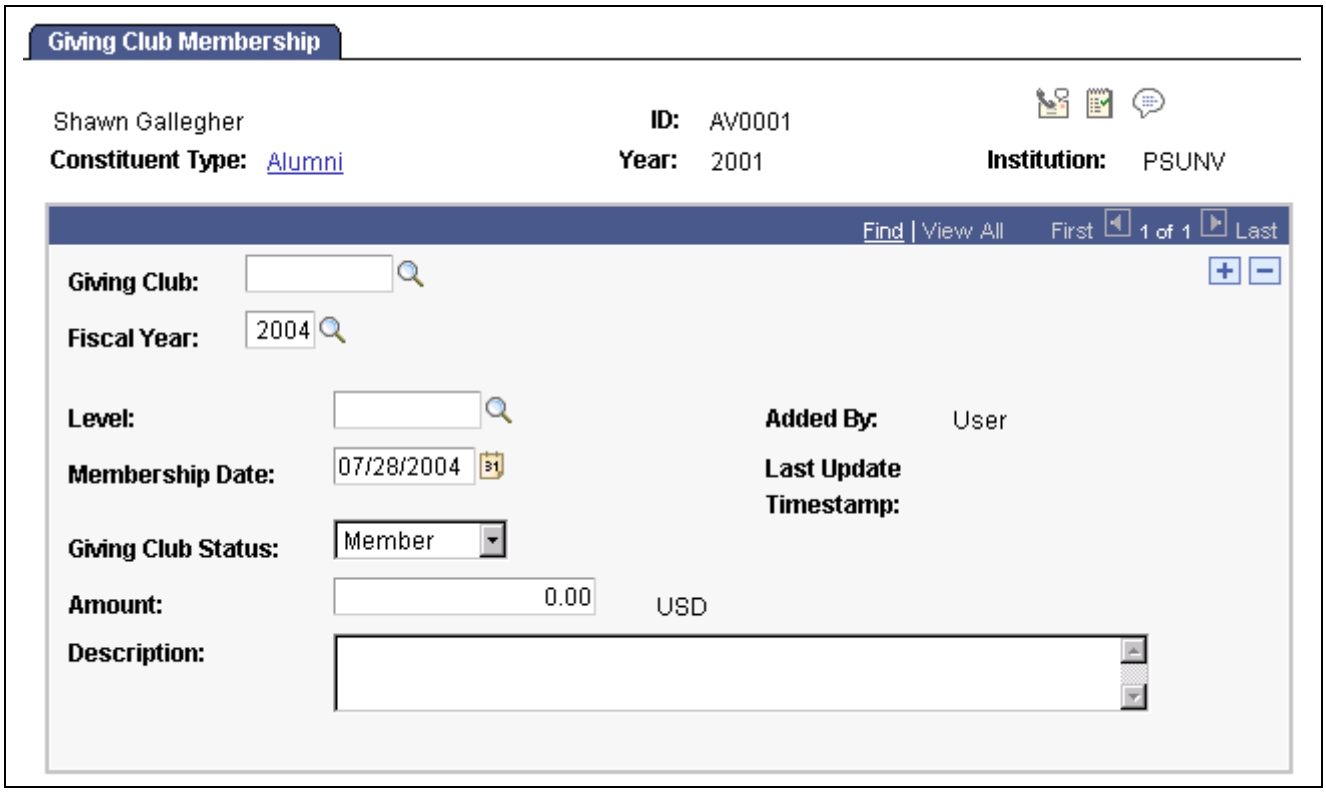
Pages Used to Manage Giving Clubs

Page Name	Object Name	Navigation	Usage
Giving Club Membership	AV_GCLUB_MBR, AV_GCLUB_MBR_E, AV_GCLUB_MBR_W	• Contributor Relations, Session Management, Giving Clubs, Giving Club Membership • Contributor Relations, Session Management, Giving Clubs, Giving Club Membership - Org • Contributor Relations, Session Management, Giving Clubs, Giving Club Membership - Wkset	Manually assign a donor to a giving club.
Process Giving Clubs	AV_RUNCTL_GCLUBS	Contributor Relations, Session Management, Giving Clubs, Process Giving Clubs	Run the appropriate process to generate giving club memberships and calculate 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	• Contributor Relations, Analyze Giving History, Person Giving Summaries, Giving Club Progress • Contributor Relations, Analyze Giving History, Organization Giving Summaries, Giving Club Progress - Org • Contributor Relations, Analyze Giving History, Workset Giving Summaries, 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	Contributor Relations, Session Management, Giving Clubs, 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	Contributor Relations, Session Management, Giving Clubs, Giving Club Detail	View detailed information about a giving club.
Giving Club Levels	AV_GCLUB_LVL_DTL	Contributor Relations, Session Management, Giving Clubs, Giving Club Detail, Giving Club Levels	View the associated membership levels for a giving club.
Giving Club Membership Summary	AV_GCLUB_MBR_SMRY	Contributor Relations, Session Management, Giving Clubs, Giving Club Member Summary	View detailed donor information about the members of a giving club.

Manually Generating Giving Club Memberships

Access the Giving Club Membership page.



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 *Member, Associate, Sponsor,* and *Benefactor.*

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 *Member* or *Accruing.* 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.

Generating Giving Club Memberships

Access the Process Giving Clubs page.



Process Giving Clubs

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 7, "Setting Up Commitment Management," Defining Giving Clubs, page 103.

Commit Level Enter the number of sessions for which giving club memberships are processed before being committed to the database.

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 returns 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.

In the Process Giving Clubs group box you have three processing options—Unprocessed Sessions, Initialize Select Giving Clubs, and Initialize All Giving Clubs—which are described in detail below. The processes that initialize clubs look at historical member data; the other simply looks at unprocessed current data. You need to select different processing options, depending on the state of your giving clubs.

Giving Club State	Correct Processing Option(s)
All giving clubs are correct	Unprocessed Sessions
Added new giving club	Unprocessed Sessions, then Initialize Select Giving Clubs
Need to rebuild giving clubs	Unprocessed Sessions, then Initialize All Giving Clubs
Changed giving club rules	Unprocessed Sessions, then Initialize Select Giving Clubs

Unprocessed Sessions Select this option to process giving clubs using the standard AVPGCLUB COBOL process. The system accesses the Session table and retrieves all

posted sessions for which giving clubs have not already been processed, based on the institution selected. This option does not look at prior giving, but calculates giving club memberships adding current qualified commitments to transactions previously processed for giving clubs.

Note. You should always run this option prior to running either of the initializing options so that all gifts are included in the initialization process.

Initialize Select Giving Clubs

Select this option to recalculate only the giving clubs you choose for the selected institution. When you select this option, a grid appears where you can select which giving clubs you want to initialize. Use this option for two types of clubs: those that are newly created, and those where the rules have changed. It may also be used if you suspect the data may be out of sync or corrupt. The system initializes the club and identifies all qualifying gifts for it. The system then assigns members to giving clubs based on all processed giving. If sessions are posted but have not been processed for giving clubs, the system does not consider those commitments when running this option.

See the note above to run unprocessed sessions first.

Initialize All Giving Clubs

Select this option to recalculate all giving clubs for the selected Institution. The system assigns all members to giving clubs active as of the Process Date, as appropriate, according to the rules set up for each club. Use this option to back up giving club information or rebuild giving club member data if you suspect the data may be out of sync or corrupt. If sessions are posted but have not been processed for giving clubs, the system does not consider those commitments when running this option.

See the note above to run unprocessed sessions first.

Warning! Do not run this process at peak giving periods, since the system uses all existing giving records during processing.

When you process giving clubs, the AVGCLUB PSJob does the following:

1. Runs the AV_GCLUB Application Engine program, which saves existing giving club membership data based on the option selected on the Process Giving Clubs page:
   - Unprocessed Sessions – Does not back up any data. Runs the giving club process for all new commitments that have not been calculated into giving clubs as of runtime.
   - Initialize Select Giving Clubs – Backs up giving club data, from the AV_GCLUB_MBR to the AV_GC_MBR_TMP table, for the selected clubs as it exists immediately prior to runtime.
   - Initialize All Giving Clubs – Backs up giving club data as it exists immediately prior to runtime, from the AV_GCLUB_MBR to the AV_GC_MBR_TMP table, for all giving clubs active as of the process date.
2. Runs the AVPGCLUB COBOL program and calculates giving club membership based on club rules based on the option selected on the Process Giving Clubs page:
   - Unprocessed Sessions – Selects commitments entered within sessions where the giving club flag (GC_FLG) equals ‘N’, evaluates new commitment data according to club rules, and updates membership data on the AV_GCLUB_MBR table based on current commitments being processed and the last GCLUB_AMT to determine new member or accrual statuses for donors.

- Initialize Select Giving Clubs – Selects commitments entered within sessions where the giving club flag (GC_FLG) equals 'Y', evaluates historical commitment data according to club rules for the selected clubs, and updates membership data on the AV_GCLUB_MBR table based on all historical commitments to determine new or reinitialized member or accrual statuses for donors.
- Initialize All Giving Clubs – Selects commitments entered within sessions where the giving club flag (GC_FLG) equals 'Y', evaluates historical commitment data according to club rules for all clubs active as of the process date, and updates membership data on the AV_GCLUB_MBR table based on all historical commitments to determine new or reinitialized member or accrual statuses for donors.

3. Creates the AVGCINIT SQR report which compares the backed up data to the newly generated giving club member data based on the option selected on the Process Giving Clubs page:
   - Unprocessed Sessions – Generates a blank report and concludes the job.
   - Initialize Select Giving Clubs – Generates an SQR report that lists differences for the selected giving clubs, ordered by giving club and fiscal year. Where a difference occurs, the old giving club level and the new giving club level appear, as well as old and new statuses and amounts. The report also includes the previous Added By value.
   - Initialize All Giving Clubs – Generates an SQR report that lists differences for all giving clubs active as of the process date, ordered by giving club and fiscal year. Where a difference occurs, the old giving club level and the new giving club level appear, as well as old and new statuses and amounts. The report also includes the previous Added By value.

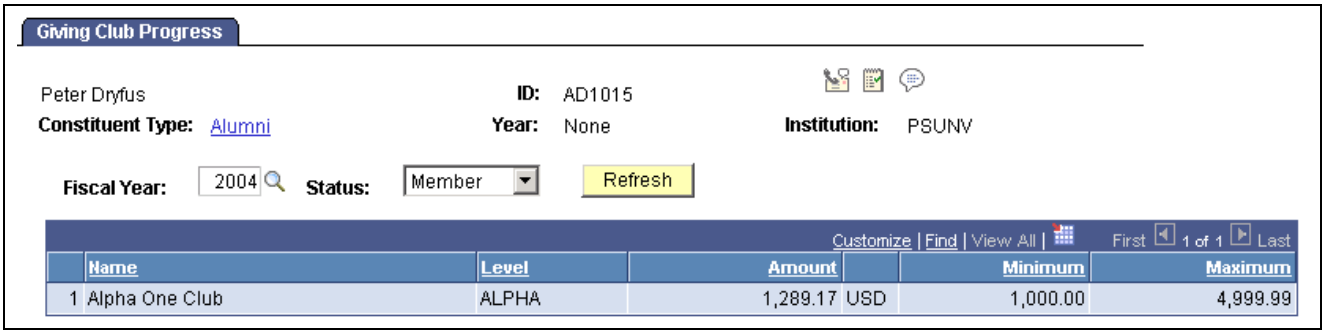
Important! Giving club members who were previously added manually to override the giving club rules may not meet criteria for membership when the club is reinitialized. The AVGCINIT report helps you identify differences between prior data and recalculated data so that you can review memberships and add complimentary memberships (at levels higher than those calculated by the program) back in the system by using the Giving Club Membership page.

See Also

Appendix C, "PeopleSoft Contributor Relations Reports," page 517

Tracking Giving Club Progress

Access the Giving Club Progress page.



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.

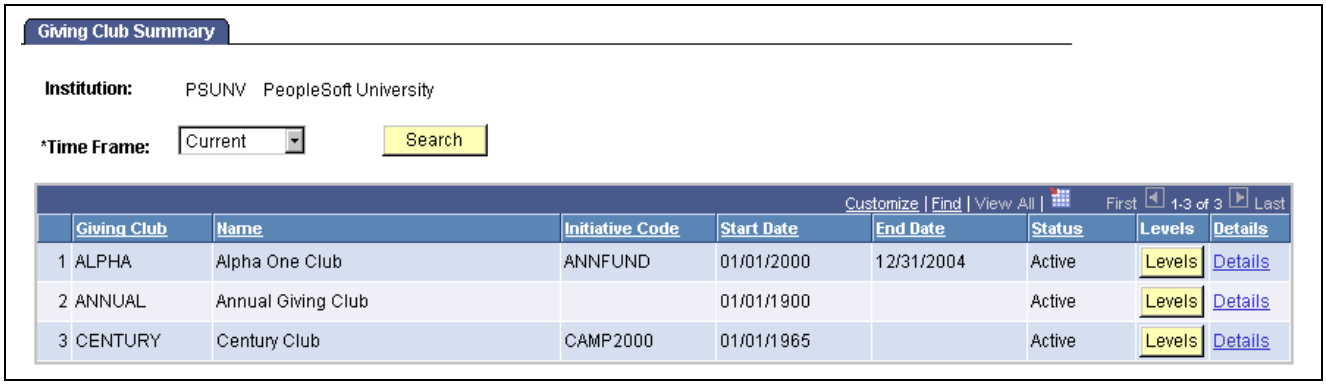
Status Select the giving club status to view information about. Values are *Member* or *Accruing*. Member indicates that the donor is currently a member at the

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 page

Levels Click to view information about the giving club levels associated with each club on the Giving Club Level Detail page.

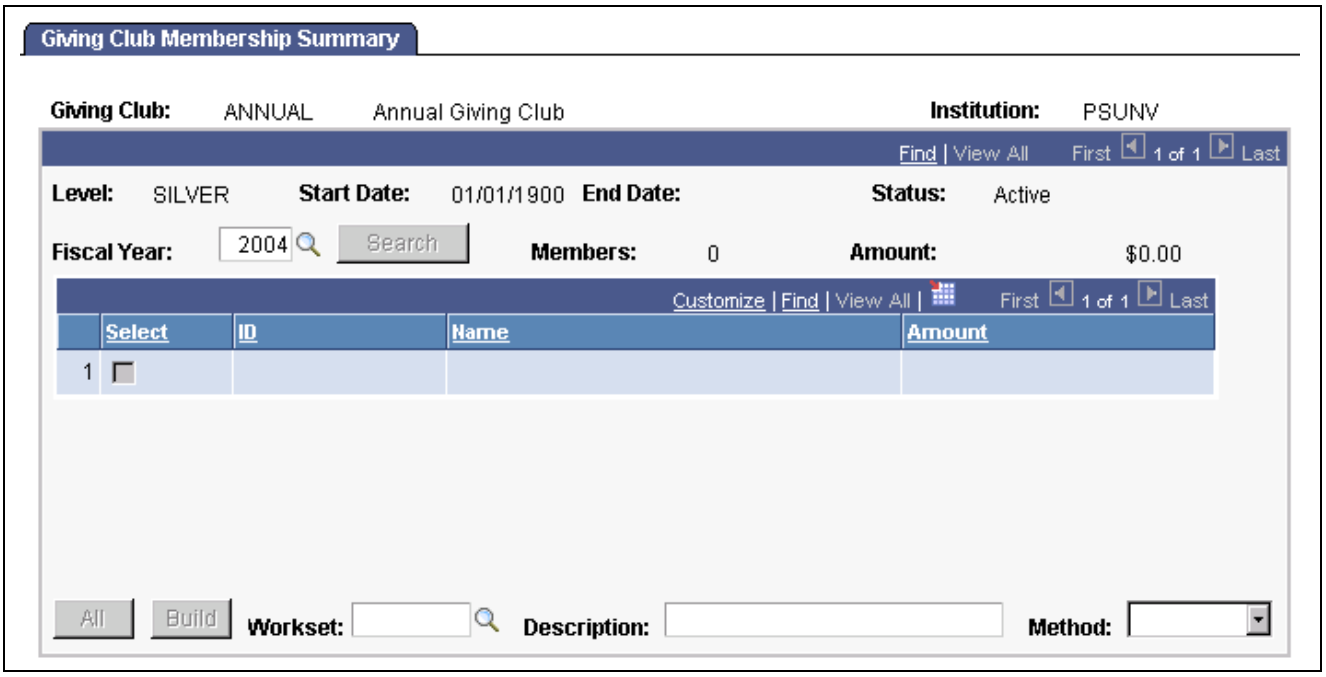
Details Click to view detailed information about a giving club on the Giving Club Detail page.

See Also

Chapter 7, “Setting Up Commitment Management,” Defining Giving Clubs, page 103

Viewing a Giving Club Membership Summary

Access the Giving Club Membership Summary page.



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 21

Chapter 18, “Processing Commitments,” Manually Generating Giving Club Memberships, page 429

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	Contributor Relations, CR Reports, Giving Reports, 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 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 CAE Report COBOL process (AVPCAE), 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. The processes create the following sections of the report:

- 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 C, “PeopleSoft Contributor Relations Reports,” AVPCAE, GFTINC, GFTINCII, GFTINCIV – CAE Gift Income Report, page 524

CHAPTER 19

Analyzing Giving History

This chapter discusses how to:

- Analyze donor history.
- Generate designation donor reports.

Analyzing Donor 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.

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 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.

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	• Contributor Relations, Analyze Giving History, Person Giving Summaries, Giving Profile • Contributor Relations, Analyze Giving History, Workset Giving Summaries, Giving Profiles - Workset	View a summary of a donor's giving history.
Giving Profile Org - Giving Profile (giving profile organization – giving profile)	AV_P_GPROFILE_E	Contributor Relations, Analyze Giving History, Organization Giving Summaries, Giving Profile - Org	View a summary of an organization's giving history.
Commitment Summary	AV_CMTMT_SMRY, AV_CMTMT_SMRY_E, AV_CMTMT_SMRY_W	• Contributor Relations, Analyze Giving History, Person Giving Summaries, Commitment Summary • Contributor Relations, Analyze Giving History, Organization Giving Summaries, Commitment Summary - Org • Contributor Relations, Analyze Giving History, Workset Giving Summaries, Commitment Summary - Workset	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.

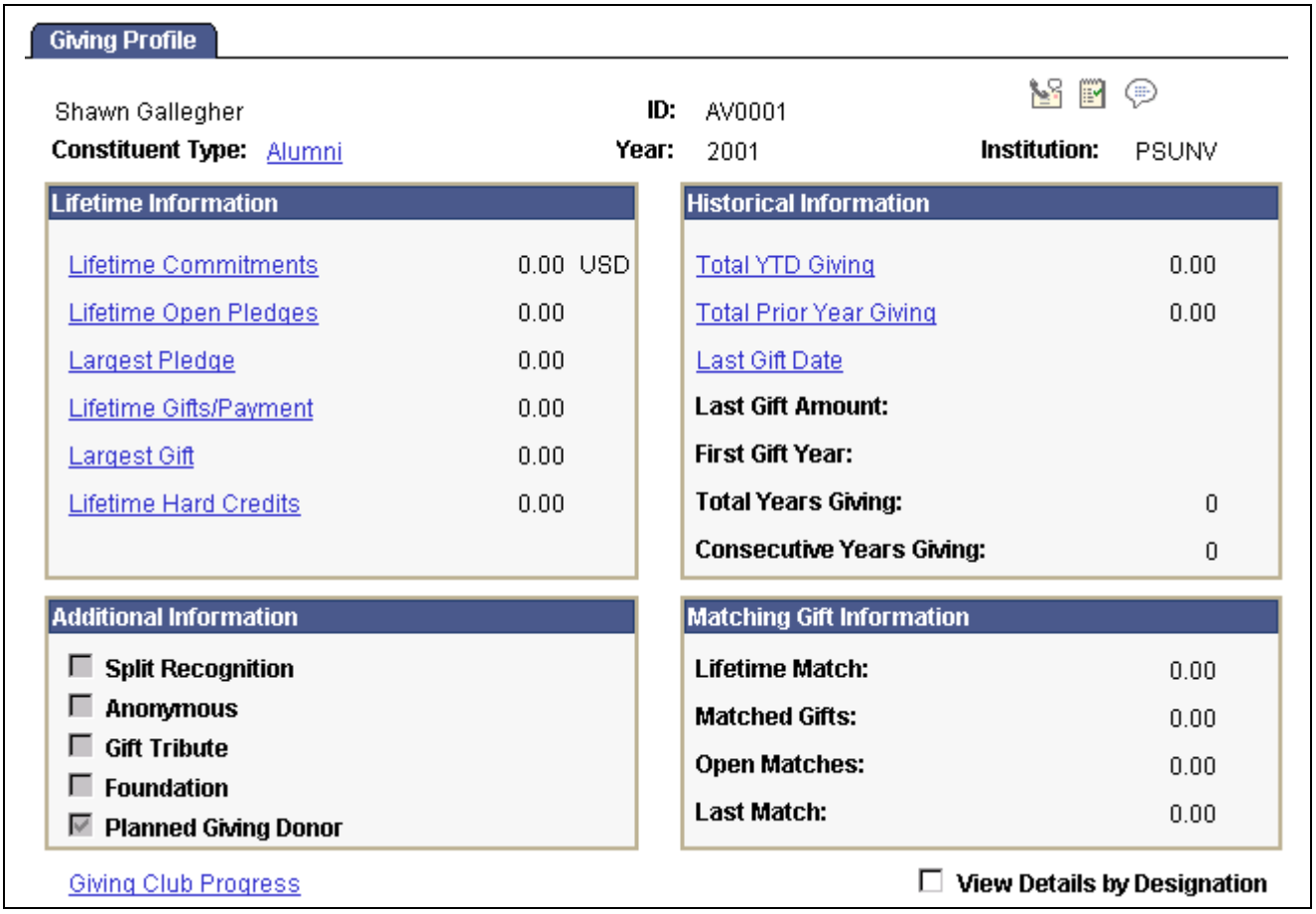
Page Name	Object Name	Navigation	Usage
Commitment Register Filter	AV_CMTMT_TRNS_FLTR	• Contributor Relations, Analyze Giving History, Person Giving Summaries, Commitment Register, Commitment Register Filter • Contributor Relations, Analyze Giving History, Workset Giving Summaries, Commitment Register - Workset, Commitment Register Filter	Choose criteria used to narrow the number of transactions you view on the Commitment Register page.
Commitment Register	AV_CMTMT_TRNS_LIST	• Contributor Relations, Analyze Giving History, Person Giving Summaries, Commitment Register, Commitment Register • Contributor Relations, Analyze Giving History, Workset Giving Summaries, Commitment Register - Workset, 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	• Contributor Relations, Analyze Giving History, Person Giving Summaries, Transaction Register, Transaction Filter • Contributor Relations, Analyze Giving History, Organization Giving Summaries, Transaction Register - Org, Transaction Filter • Contributor Relations, Analyze Giving History, Workset Giving Summaries, Transaction Register - Workset, 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	• Contributor Relations, Analyze Giving History, Person Giving Summaries, Transaction Register, Transaction Register • Contributor Relations, Analyze Giving History, Organization Giving Summaries, Transaction Register - Org, Transaction Register • Contributor Relations, Analyze Giving History, Workset Giving Summaries, Transaction Register - Workset, Transaction Register	View the transactions that meet the criteria you selected on the Transaction Filter page.
Adjust Gift Detail	AV_ADJ_GIFT_DTL_SP	• Select the View Adjustments check box on the Commitment Register Filter or Transaction Filter page. • Click the Details link on the Commitment Register or Transaction Register page for an adjusted gift.	View detailed information about an adjusted gift.
Adjust Pledge Detail	AV_ADJ_PLDG_DTL_SP	• Select the View Adjustments check box on the Commitment Register Filter or Transaction Filter page. • Click the Details link on the Commitment Register or Transaction Register page for an adjusted pledge.	View detailed information about an adjusted pledge.
Profile Compare	AV_GP_WSET_CMPR	Contributor Relations, Analyze Giving History, Workset Giving Summaries, Giving 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.

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 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 Displays the total amount of money ever donated by the donor. This amount only includes money actually received, and excludes outstanding pledges.

Click to view the date, gift type, credit type, and amount for each gift given on the Lifetime Gifts and Pledge Payments page.

Largest Gift Displays the amount of the largest gift given by the donor.

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.

Lifetime Hard Credits Displays the total amount of hard credit given to the donor for recognition purposes.

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.

Historical Information

Total YTD Giving Displays the total amount of money donated by the constituent during the current fiscal year.

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.

Total Prior Year Giving Displays the total amount of money donated by the constituent during the previous fiscal year.

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.

Last Gift Date 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.

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.

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.

Gift Tribute If selected, indicates that the donor has made at least one commitment to the institution in honor of or in memory of another person.

Foundation If selected, indicates that the donor has a relationship established in the system with a foundation. Foundations must have a constituent type of *Corporate Foundation, Foundation,* or *Personal, Family/Foundation.*

Planned Giving Donor If selected, indicates that the donor has made a commitment through a deferred gift tracked in Planned Giving under Prospect Management.

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. If you select this check box, the business unit for each designation appears on the subsequent inquiry page.

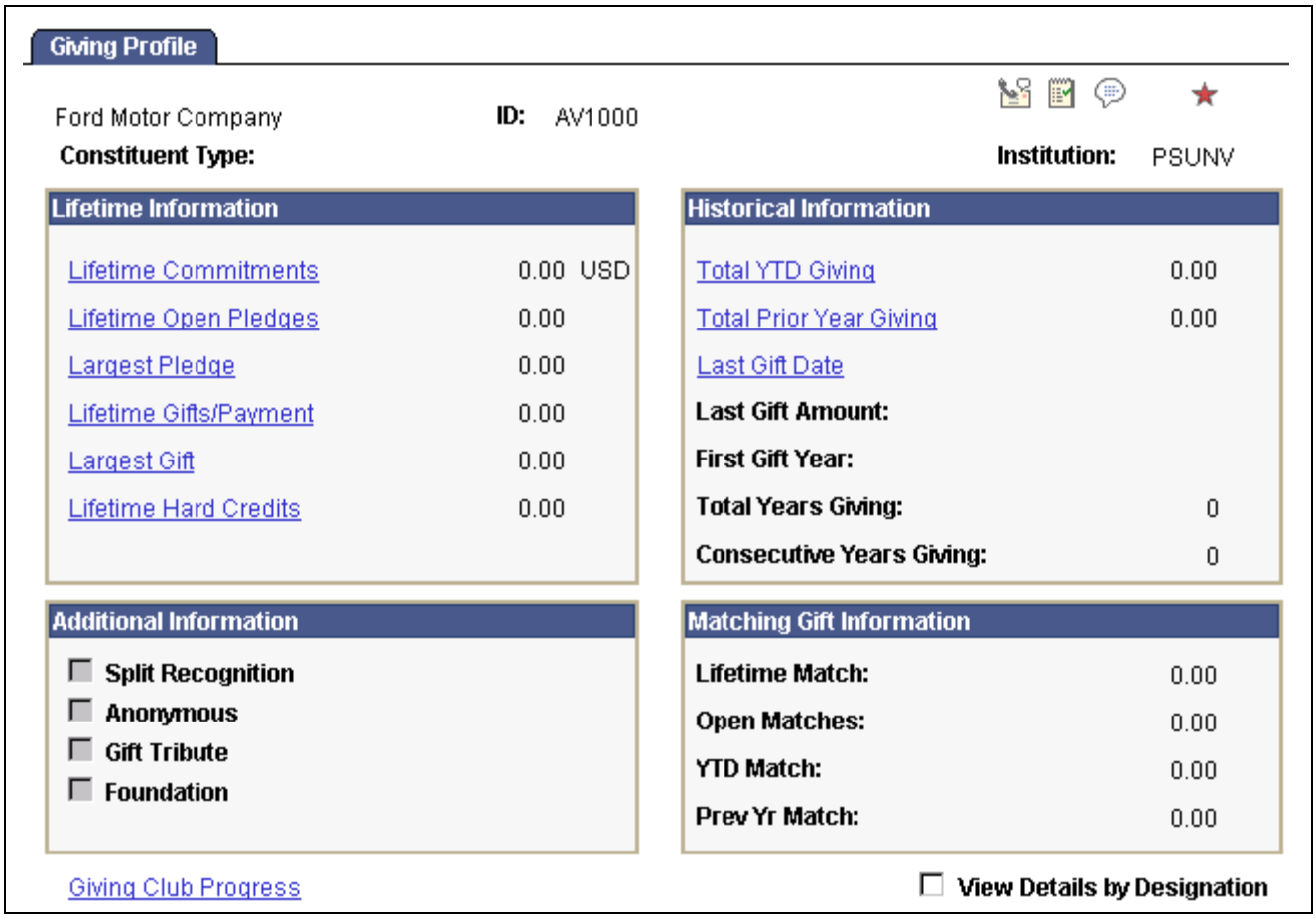
Giving Club Progress Click to view information about a donor's progression through giving clubs and various club levels at your institution. The Giving Club Progress page appears.

See Also

Chapter 18, "Processing Commitments," Tracking Giving Club Progress, page 433

Viewing an Organization's Giving Profile

Access the Giving Profile page.



Giving Profile page for organizations

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 Displays the total amount of money ever donated by the organization. This amount only includes money actually received, and excludes outstanding pledges.

Click to view the date, gift type, credit type, and amount for each gift given on the Lifetime Gifts and Pledge Payments page.

Largest Gift Displays the amount of the largest gift given by the organization.

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.

Lifetime Hard Credits Displays the total amount of hard credit given to the organization for recognition purposes.

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.

Historical Information

Total YTD Giving Displays the total amount of money donated by the organization during the current fiscal year.

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.

Total Prior Year Giving Displays the total amount of money donated by the organization during the previous fiscal year.

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.

Last Gift Date 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.

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.

Last Gift Amount Displays the amount of the organization's most recent gift.

First Gift Year Displays the year in which the organization 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 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.

Gift Tribute If selected, indicates that the donor has made a gift in memory of or in honor of another individual.

Foundation If selected, indicates that the organization has a relationship established in the system with a foundation. Foundations must have a constituent type of *Corporate Foundation, Foundation,* or *Personal, Family/Foundation.*

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.

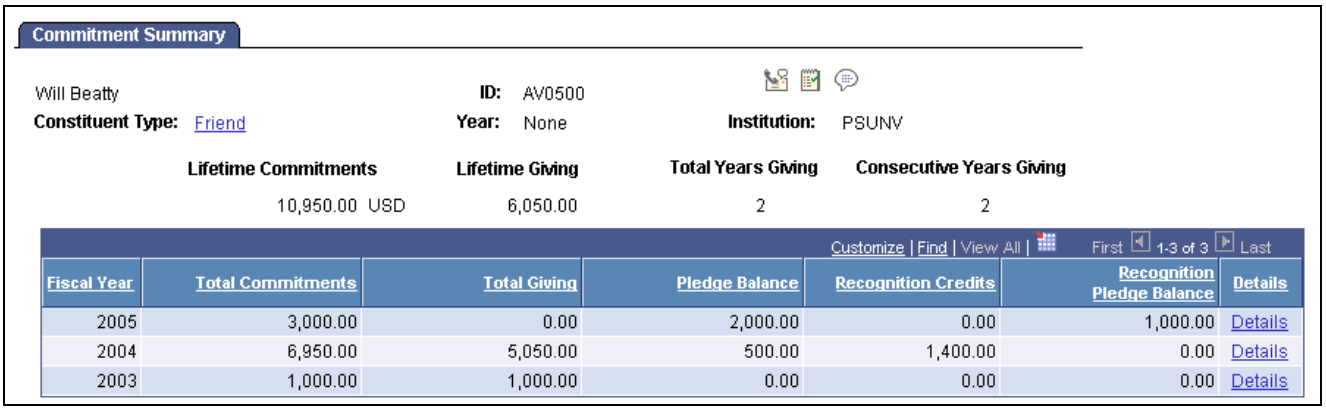
Giving Club Progress Click to view information about a donor's progression through giving clubs and various club levels at your institution on the Giving Club Progress page.

See Also

Chapter 18, "Processing Commitments," Tracking Giving Club Progress, page 433

Viewing a Donor's Commitment Summary

Access the Commitment Summary page.



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.

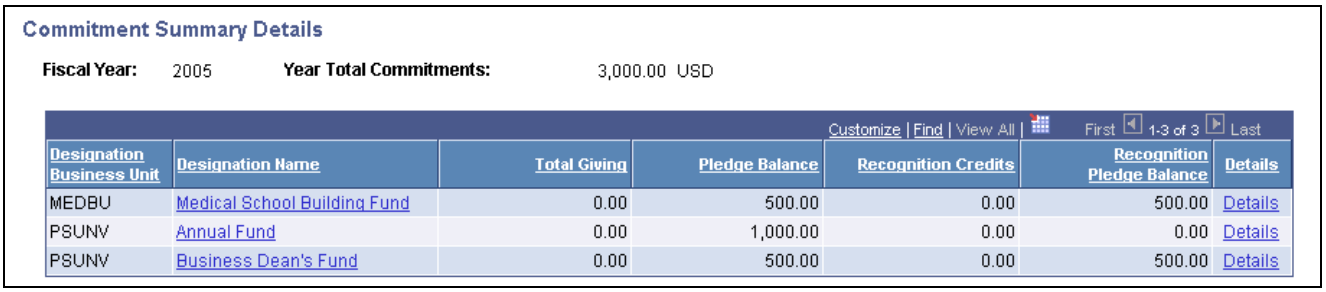
Lifetime Giving Displays the total amount of money ever donated by the constituent. This amount only includes money actually received, and excludes outstanding pledges.

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 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.

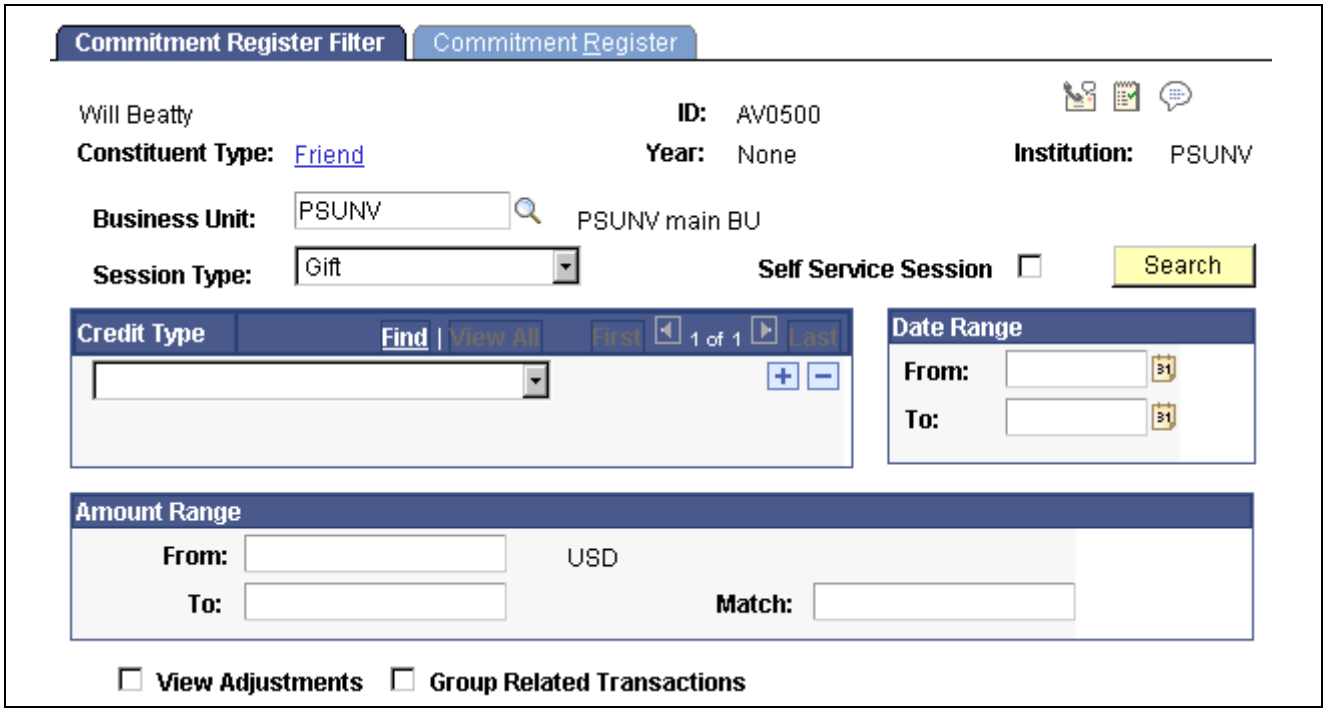
Pledge Balance Displays the total amount in outstanding pledges the donor carries to this designation during this fiscal year.

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 Filter 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.



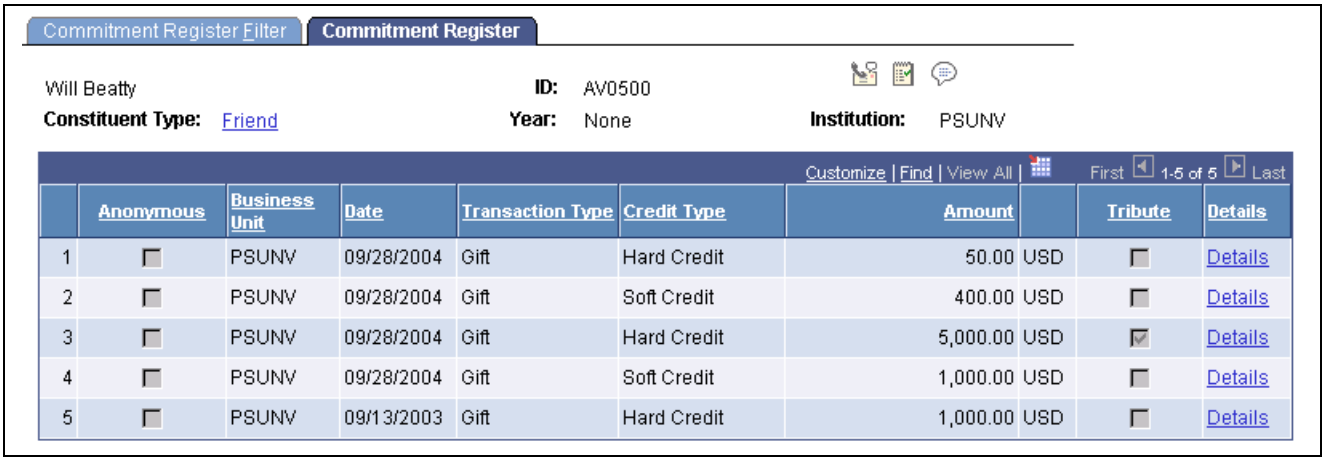
Commitment Register Filter page

After 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 page

Anonymous If selected, this check box indicates that the donor's part of a particular gift or pledge has been designated as *Anonymous*.

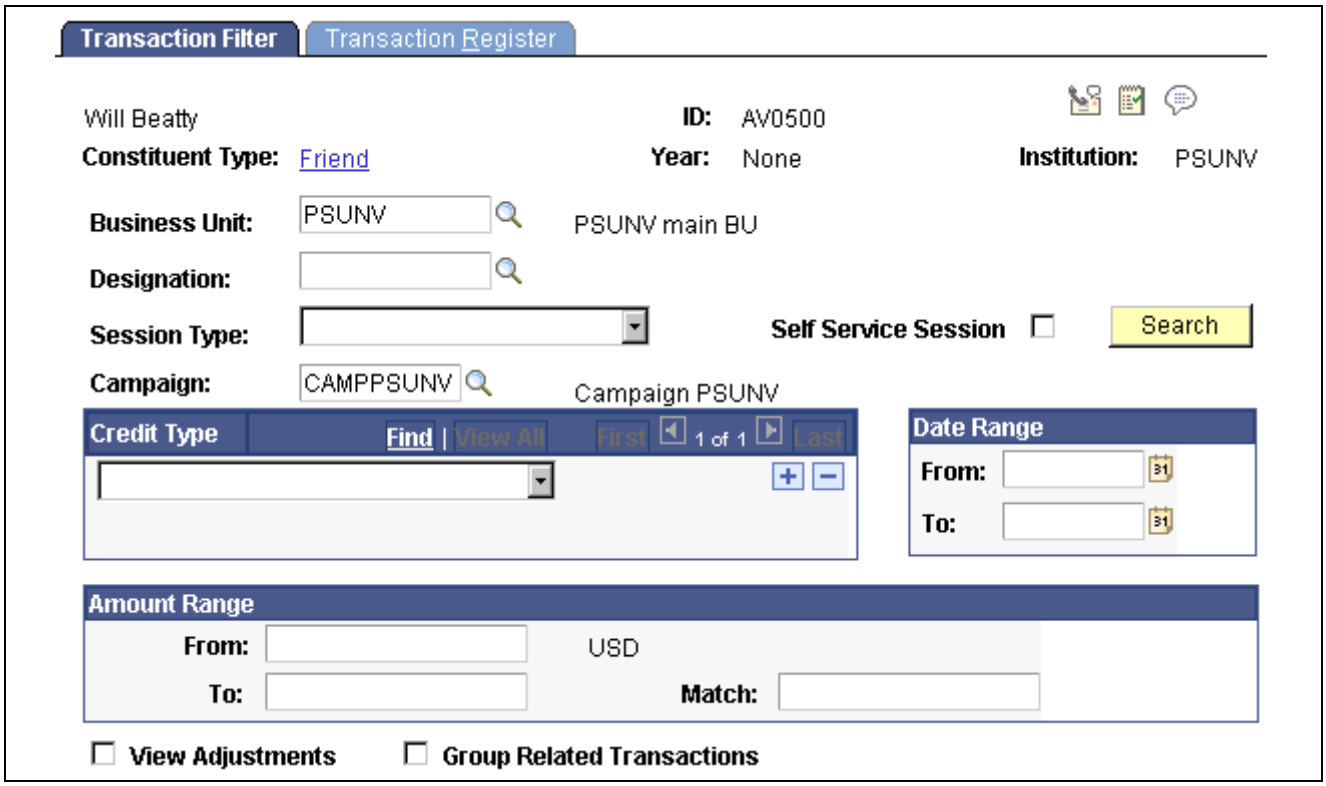
Tribute If selected, this check box indicates that a particular gift or pledge has related tribute information.

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.

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.

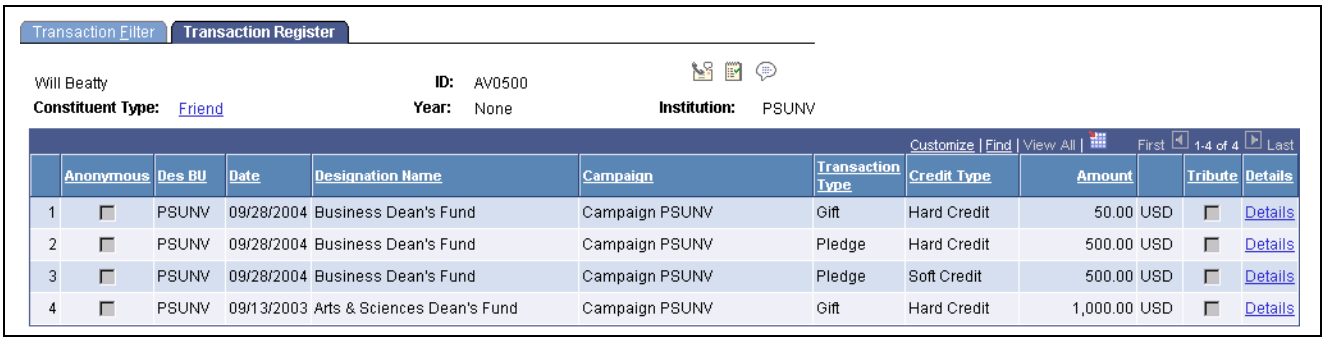
Campaign Select a campaign from the prompt box containing all the valid campaign initiatives at your institution. A campaign is an organized institutional effort targeted to a specific constituency that occurs over a specified period of time with specific purposes and goals.

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 Register page

Anonymous If selected, this check box indicates that the donor's part of a particular gift or pledge has been designated as *Anonymous*.

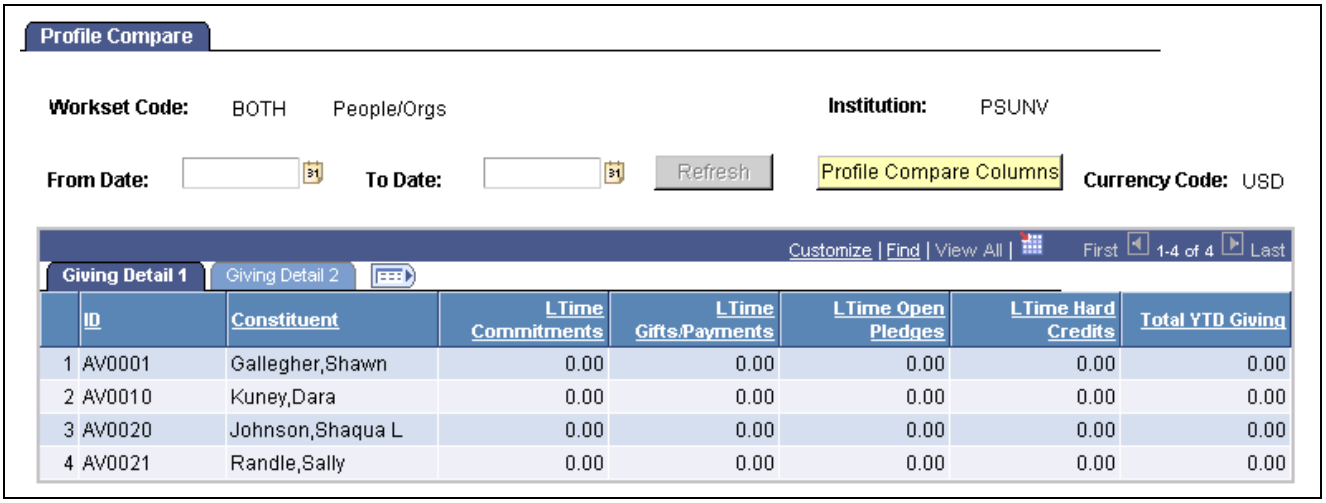
Des BU (designation business unit) Displays the name of the designation business unit to which the commitment was allocated.

Tribute If selected, this check box indicates that a particular gift or pledge has related tribute information.

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.



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 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 viewable grid.

See Also

PeopleSoft Enterprise Campus Solutions 8.9 Application Fundamentals PeopleBook, "Setting User Defaults," Defining Contributor Relations User Defaults

Generating Designation Donor Reports

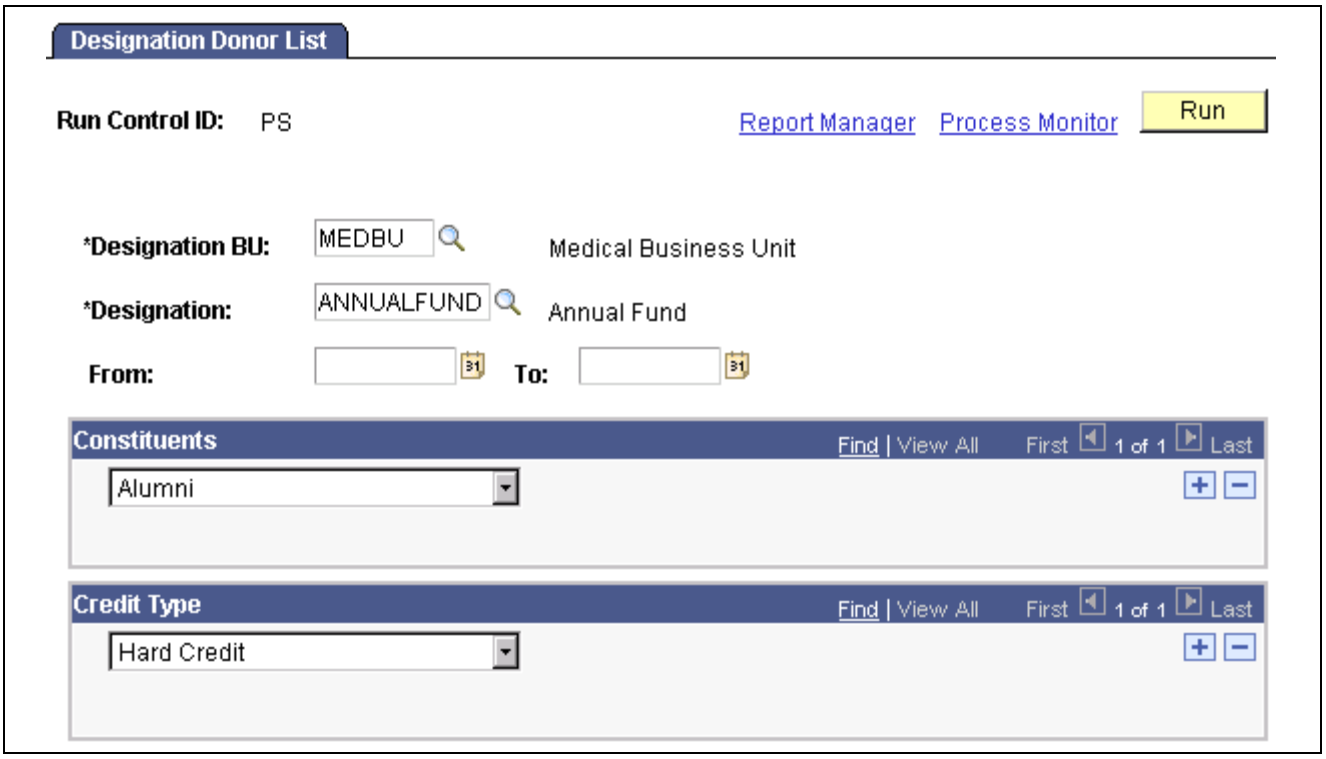
This section discusses how to generate reports that list donors to a specific designation.

Page Used to Generate Designation Donor Reports

Page Name	Object Name	Navigation	Usage
Designation Donor List	AV_RUNCTL_DESDN	Contributor Relations, CR Reports, Giving Reports, 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

Designation BU (designation 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 26.

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. He makes the first commitment as a student in October 1995, and the second as an alumnus in October 1998.

Gift Amount	Gift Date	Constituent Type	Credit Type
1,000.00 USD	10/01/95	Student	Soft Credit
2,000.00 USD	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 1,000.00 USD gift from Shawn Gallegher 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 1,000.00 USD gift from Shawn Gallegher 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 2,000.00 USD gift from Shawn Gallegher 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 3,000.00 USD gift from Shawn Gallegher with a Constituent Type of *Alumni*. Both commitments are included within these parameters, and *Alumni* is the constituent type returned for Shawn Gallegher because it has the highest priority of the commitments selected.

See Also

Appendix C, "PeopleSoft Contributor Relations Reports," Contributor Relations Reports: Selected Reports, page 518

CHAPTER 20

Interfacing with PeopleSoft Enterprise Financials

This chapter provides overviews of GL interface publish-and-subscribe functionality and Financials 8.4 and 8.8 interface messaging, and also discusses how to:

- Set up the Contributor Relations system to integrate with the Financials 8.4 or 8.8 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 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 Financials 8.4, Contributor Relations can use publish and subscribe functionality (messaging back and forth) between its database and 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 real time.

Publish and subscribe functionality helps your institution's ability to track financial information in both Contributor Relations and Financials, since the messages sent from Financials to 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.

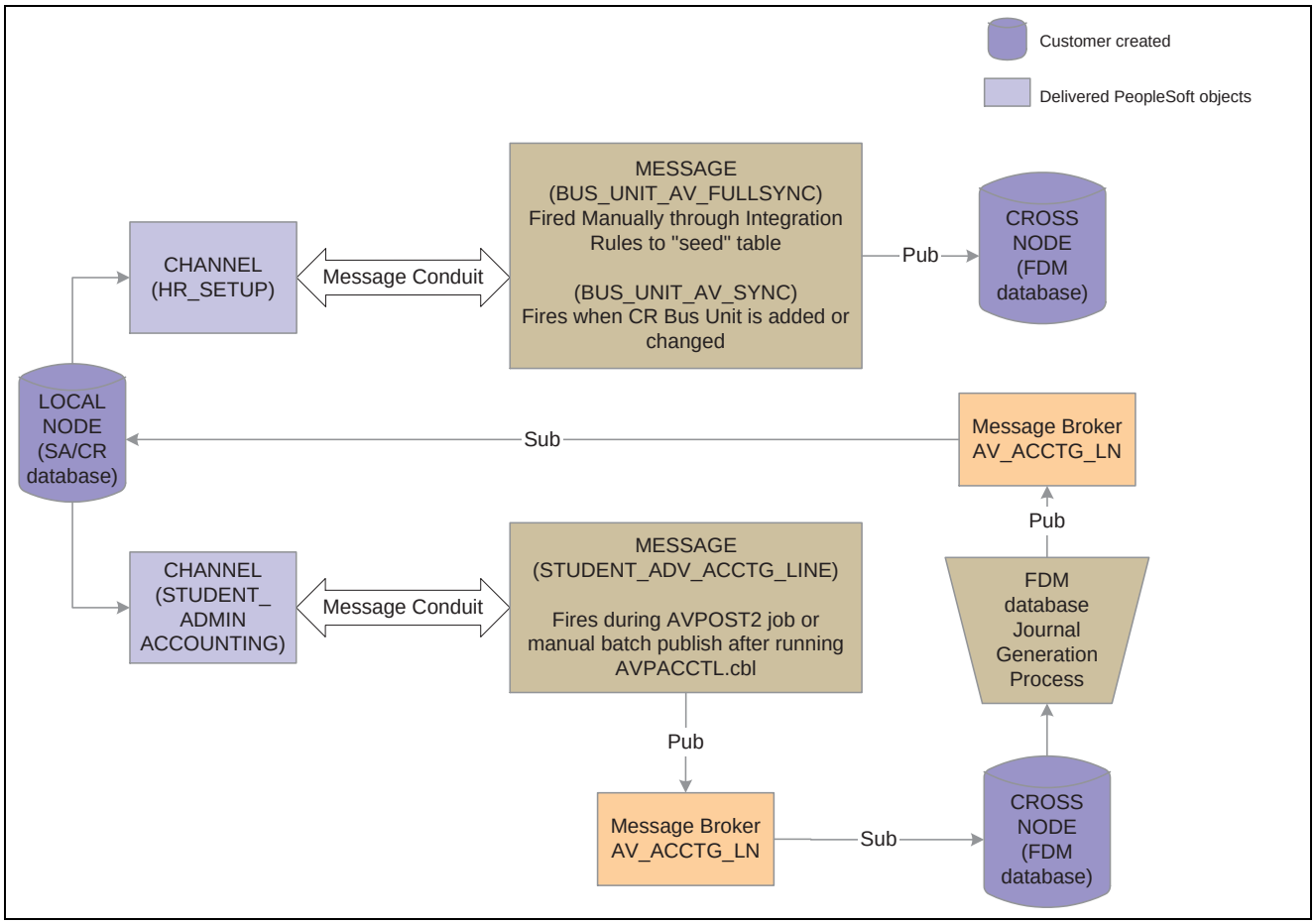
See Also

Chapter 18, "Processing Commitments," Processing and Posting Sessions, page 381

PeopleSoft General Ledger 8.8 PeopleBook, "Integrating and Transferring Information Among Applications"

Understanding Messaging

The diagram below illustrates how messages travel between Contributor Relations and Financials 8.4 or 8.8.



Messaging process for Contributor Relations to Financials 8.4 or 8.8

Contributor Relations delivers two message channels and three messages to the 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 Financials and, after journal generation, retrieves the updated AV_ACCTG_LN records into Contributor Relations.
HR_SETUP	BUS_UNIT_AV_ FULLSYNC	Sends the BUS_UNIT, DESCR, and DESCRSHORT rows in the AV_BUS_UNIT_TBL to Financials to seed its AV_BUS_UNIT_TBL.
	BUS_UNIT_AV_SYNC	Sends new 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 Financials side, message definition and message channel naming must match the naming used on the Contributor Relations side.

Setting Up Integration with Financials 8.4 or 8.8

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 Contributor Relations business unit data with Financials.

Pages Used to Set Up Integration with Financials 8.4 or 8.8

Page Name	Object Name	Navigation	Usage
CR Installation (Contributor Relations installation)	AV_INSTALLATION	Set Up SACR, Install, Contributor Rel 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	Enterprise Components, Integration Definitions, 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	Enterprise Components, Integration Definitions, Batch Publish Rules, Batch Programs	Define the process that the manual or automatic process will access (AVPACCTL).
Full Table Publish Rules	EO_MSGPUBFULL	Enterprise Components, Integration Definitions, Full Data Publish Rules	Define publish rules that enable messaging.
Full Data Publish	EO_FULLDATAPUB	Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish	Define full data publish run control for the BUS_UNIT_AV_ FULLSYNC message.

Identifying Financials Software Version

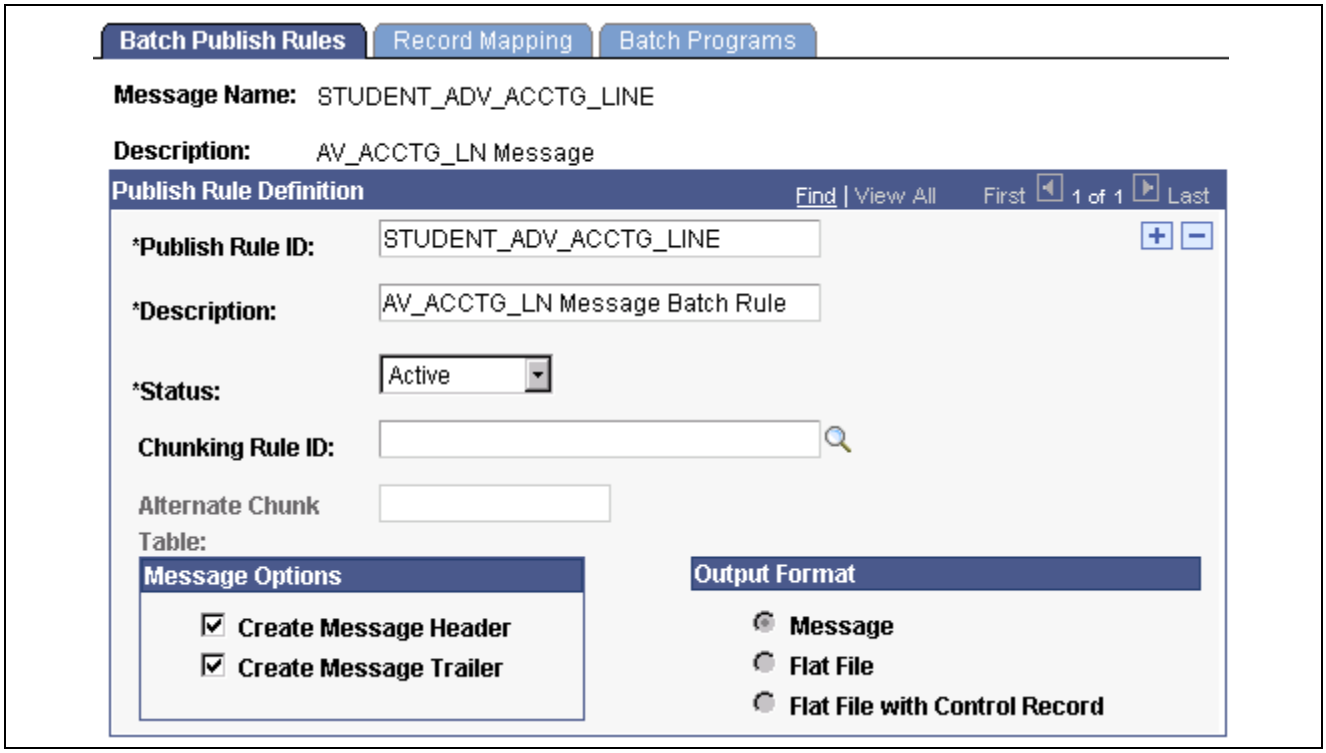
Your Financials Release selection on the CR Installation page determines which "path" the Contributor Relations system will use to transfer accounting line information. The values *7.5* and *Other* trigger a flat-file approach, in which the system creates a flat file that can be picked up and used both by older versions of Financials and by an external financial application. The values *8.4* or *8.8* triggers an integrated messaging interface.

See Also

Chapter 2, "Setting Up Your 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.



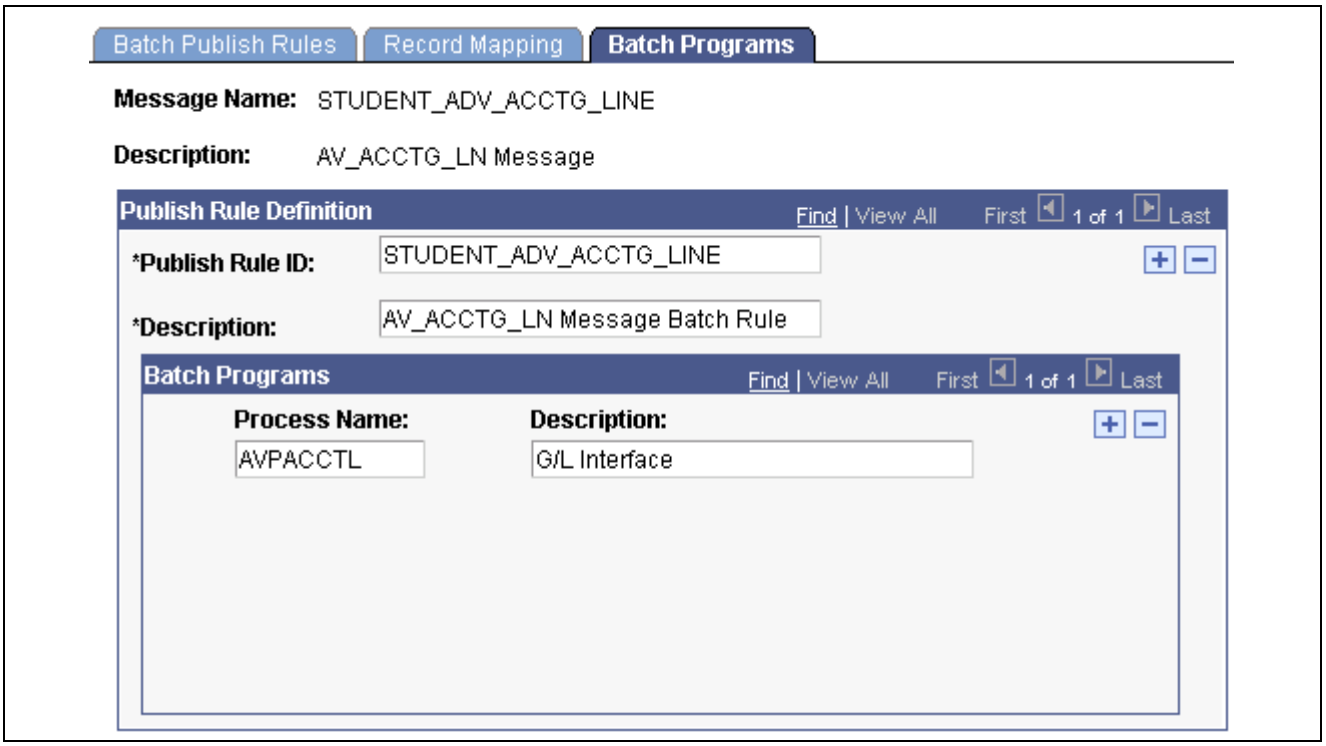
Batch Publish Rules page

To define batch publish rules:

1. Enter *STUDENT_ADV_ACCTG_LINE.* in the Publish Rule ID field.
2. Select *Active* in the Status field.
3. For Financials 8.4 integration, select the Create Message Header and Create Message Trailer check boxes. For Financials 8.8 integration, clear these check boxes.

Defining Batch Programs

Access the Batch Programs page.



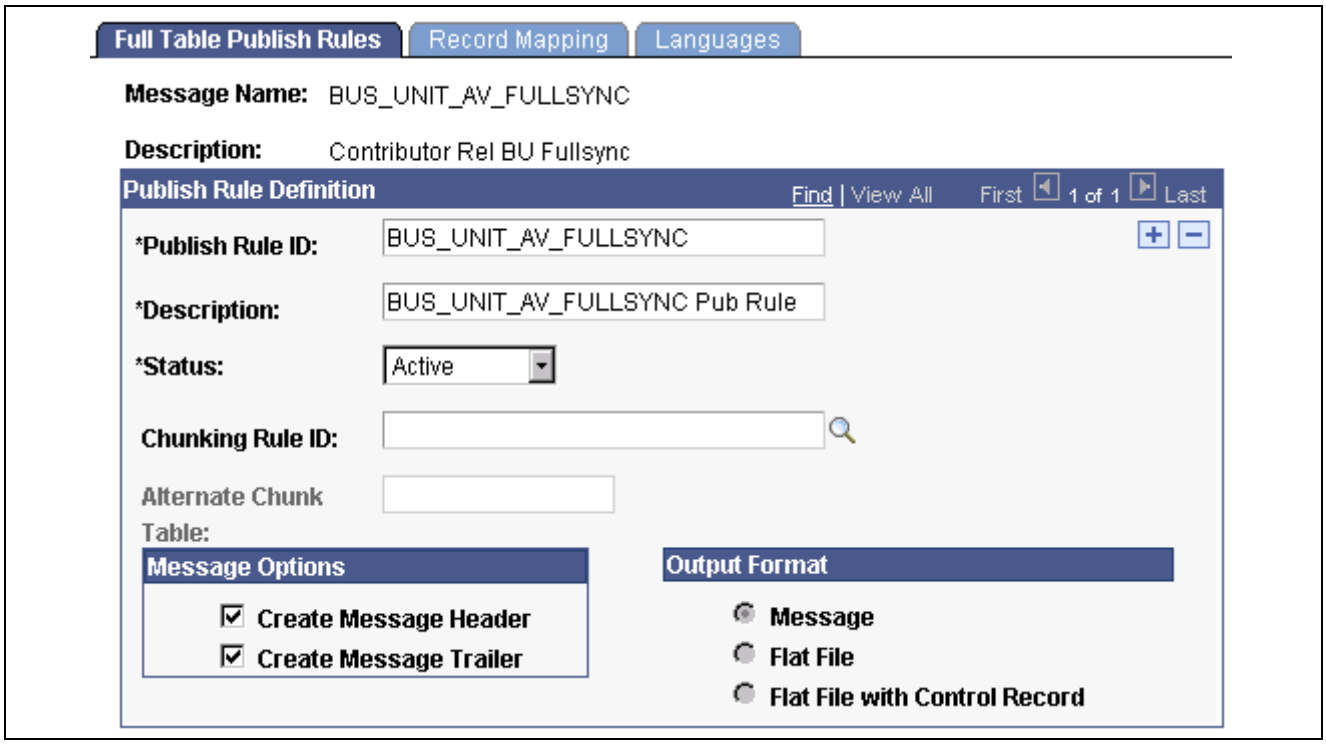
Batch Programs page

Enter the Process Name *AVPACCTL,* which EOP_PUBLISHA or EOP_PUBLISHM will pick up when publishing accounting lines to the Financials system. If you do not select this process, the messages will not be created when EOP_PUBLISHA 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" Contributor Relations business unit information between Contributor Relations and Financials.

Note. You must synchronize all 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 page

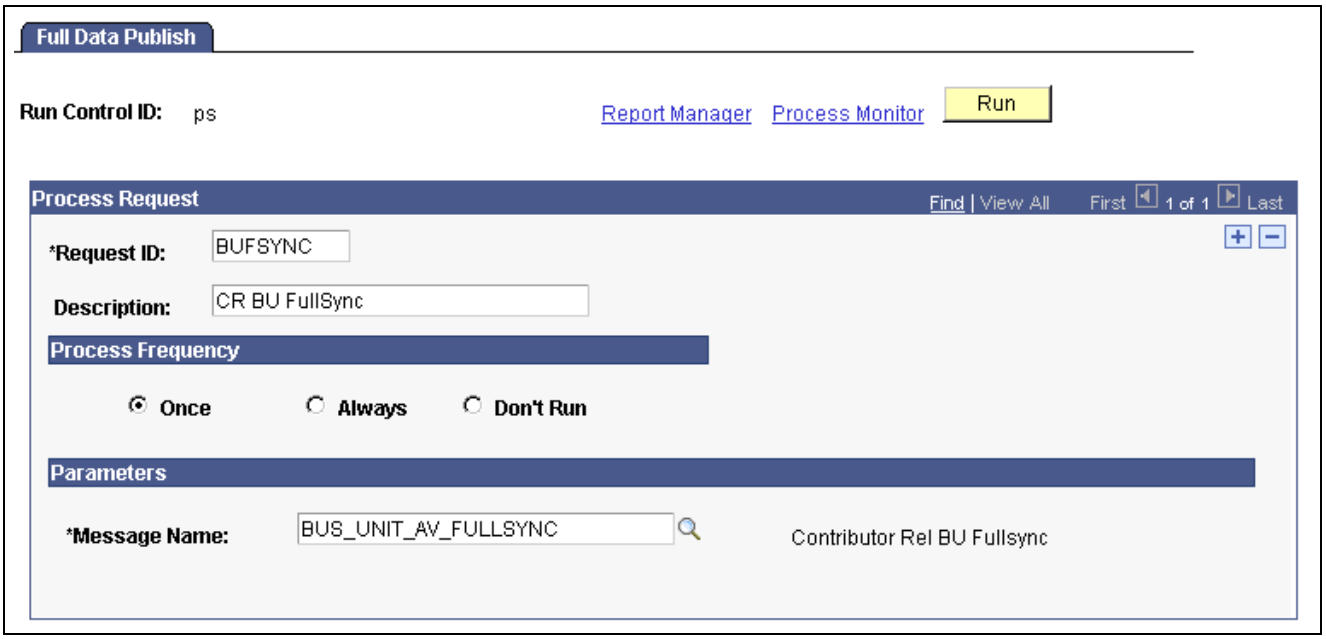
Publish Rule ID Enter *BUS_UNIT_AV_FULLSYNC*. This rule publishes three fields (Business Unit, Description, Short Description) for all rows on the table to Financials.

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 Contributor Relations Business Unit Data with Financials

Access the Full Data Publish page.



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 the system if the Financials database becomes unsynchronized or corrupt.

3. Enter *BUS_UNIT_AV_FULLSYNC* in the Message Name field.
4. Click Run.

When this process has run, the system keeps business units synchronized by triggering a message to the 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 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. Financials must subscribe to these Contributor Relations published messages to keep its database up to date.

See Also

PeopleSoft General Ledger 8.8 PeopleBook

Publishing Accounting Line Information Automatically

This section discusses how to run the AVPOST2 job.

Page Used to Publish Accounting Line Information Automatically

Page Name	Object Name	Navigation	Usage
GL Interface (general ledger interface)	AV_RUN_CNTL_GL	Contributor Relations, Session Management, Process Sessions, G/L Interface	Enter process parameters and run the AVPOST2 process, which creates accounting lines ready for publishing into your institution's Financials system and activates the message that the lines are ready for Financials 8.4 or 8.8.

Running the AVPOST2 Job

Access the GL Interface page. This page displays the Financials Release that you selected on the CR Installation page.

See Chapter 18, "Processing Commitments," Running the GL Interface Job (AVPOST and AVPOST2), page 386.

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 Financials database.

Financials subscribes to the published messages in the Contributor Relations database, takes the accounting lines into their AV_ACCTG_LN table, and runs those lines through Journal Generator to create journals. Financials then publishes the updated accounting lines, Contributor Relations subscribes to these lines, and the data published by Financials updates the Contributor Relations AV_ACCTG_LN table.

The 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 Financials system returns accounting lines, the AUDIT_ACTN value on the Contributor Relations AV_ACCTG_LN record is changed from *A* (add) to *C* (changed).

See Also

Chapter 18, "Processing Commitments," Running the GL Interface Job (AVPOST and AVPOST2), page 386

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 the accounting lines before they are sent to 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 Line Information Manually

Page Name	Object Name	Navigation	Usage
GL Interface (general ledger interface)	AV_RUN_CNTL_GL	Contributor Relations, Session Management, Process Sessions, G/L Interface	Enter process parameters and run the AVPACCTL process, which creates accounting lines ready for publishing into your institution's Financials system but does not activate the message that the lines are ready for Financials 8.4 or 8.8.
Batch Publish	EO_BATCHPUB	Enterprise Components, Integration Definitions, Initiate Processes, Batch Publish	Run the EOP_PUBLISHM process, which publishes batches of accounting lines into your institution's Financials system.

Entering AVPACCTL Parameters

Access the GL Interface page. This page displays the 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.

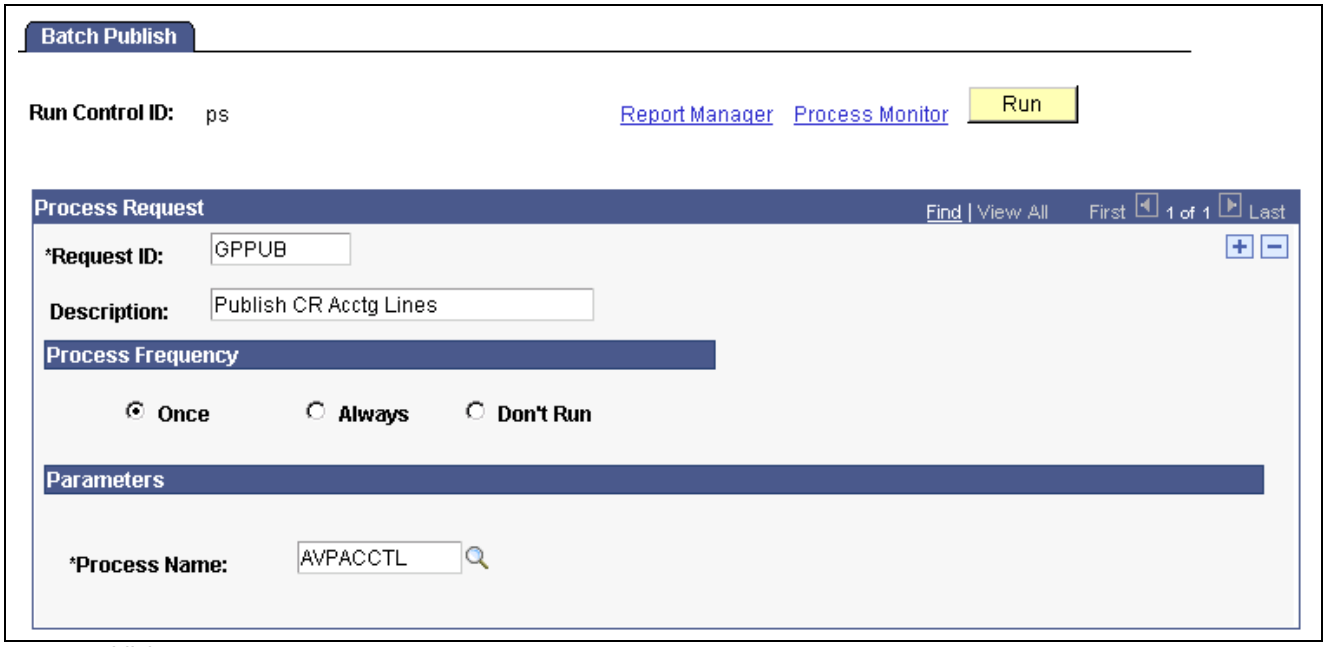
From that page, run the AVPACCTL process, which creates accounting lines and puts the process instance entries into the PS_EO_MSGBATPRM table.

See Also

Chapter 20, "Interfacing with PeopleSoft Enterprise Financials," Publishing Accounting Line Information Manually, page 465

Running the Batch Publish Application Engine Process (EOP_PUBLISHM)

After you have manually generated accounting lines, access the Batch Publish page to publish them to the Financials database.



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 Financials database.

Financials treats the published messages the same way, regardless of whether you generate the accounting lines automatically or manually.

See Also

Chapter 20, "Interfacing with PeopleSoft Enterprise Financials," Publishing Accounting Line Information Automatically, page 463

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

Enterprise PeopleTools PeopleBook: PeopleSoft Application Engine

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 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 Contributor Relations through the STUDENT_ADV_ACCTG_LINE subscription message after the journals are generated in Financials.

GL Chartfield 1 and 2 tabs

These tabs show information sent to 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 18, "Processing Commitments," Viewing Accounting Lines, page 402

Understanding Interface Setup Best Practices

This section discusses how to:

- Avoid integration setup errors.
- Avoid message channel errors.
- Avoid messaging errors.

Avoiding Integration Setup Errors

There are several areas where you can review your settings and make the necessary corrections to avoid errors after setting up your Contributor Relations system to integrate with Financials 8.4 or 8.8.

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 Financials Release to *8.4* or *8.8* on the CR Installation page.

See Also

Chapter 20, "Interfacing with PeopleSoft Enterprise Financials," Defining Batch Publish Rules, page 460

Chapter 20, "Interfacing with PeopleSoft Enterprise Financials," Setting Up Business Unit Synchronization, page 461

Chapter 20, "Interfacing with PeopleSoft Enterprise Financials," Identifying Financials Software Version, page 460

Avoiding Message Channel Errors

Verify your channel settings in Application Designer. This will help you avoid situations in which a published message remains in *New* status and does not complete its path and change the status to *Done,* or in which the message does not appear in the Application Messaging Monitor after the process to generate it is complete.

Note. HR_SETUP channel is for the business unit messages and STUDENT_ADMIN_ACCOUNTING channel is for the Accounting line message.

The following best practices apply to the channels HR_SETUP and STUDENT_ADMIN_ACCOUNTING:

- 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.

Avoiding Messaging Errors

Review your security settings. This will help you avoid situations in which a published message remains in *New* status rather than completing its path and changing status to *Done,* or in which the message does not appear in the Application Messaging Monitor after the process to generate it is complete.

To check security settings:

1. Navigate to PeopleTools, Security, Permissions & Roles, 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 can now return to the Application Message Monitor and search for a particular message/channel.

Verify your channel settings in Application Designer. Verify these items in both the Contributor Relations and 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.

Verify your message definition settings in Application Designer. Verify statuses for the Contributor Relations message subscription STUDENT_ADV_ACCTG_LINE and the Financials 8.4 or 8.8 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.

Ping the publishing and subscribing database nodes.

To ping a database node:

1. Sign on to the Contributor Relations database.
2. Navigate to Integration Broker, Monitor, Monitor Message, Node Status tab 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 Financials database and ping the Contributor Relations database node using Integration Broker.

   See *Enterprise PeopleTools PeopleBook: PeopleSoft 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 21

Working with Self-Service Involvement

This chapter provides an overview of Involvement as well as the self-service online giving and pledge life cycles, and discusses how to:

- 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.

Understanding Involvement

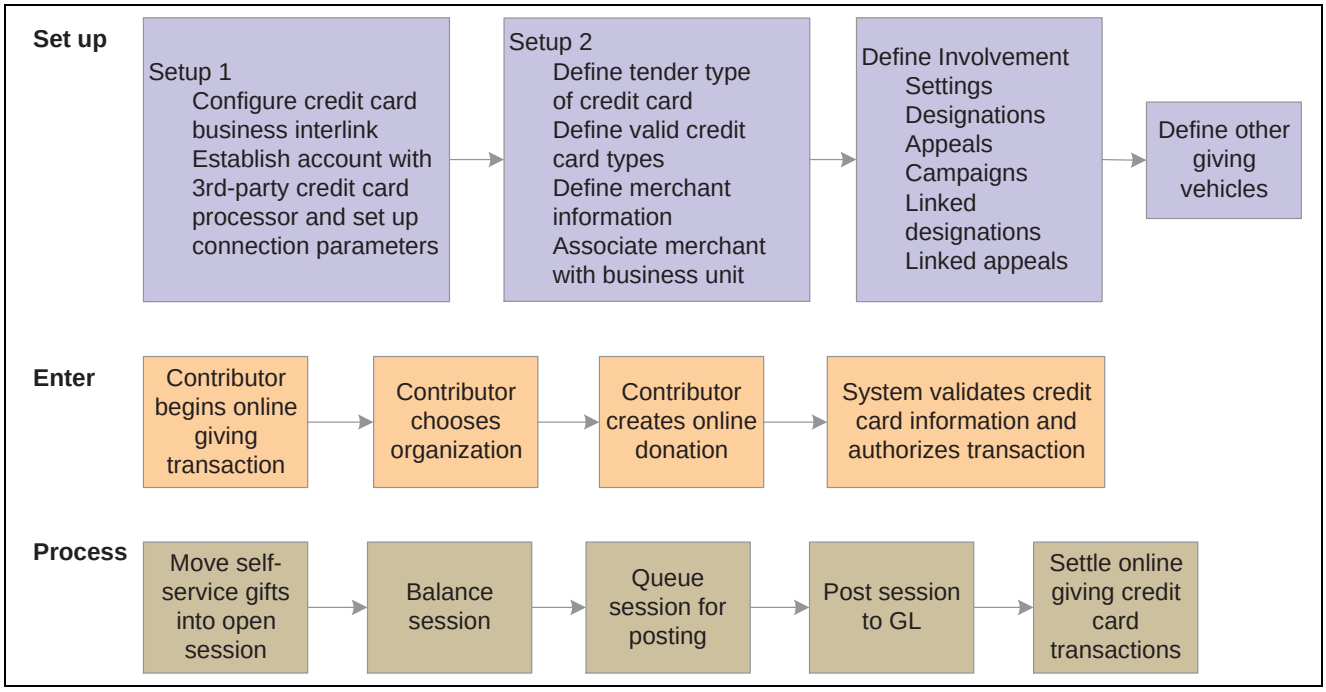
PeopleSoft Enterprise Campus Solutions offer self-service applications that are licensed separately. If you have licensed the Involvement application, you can use the self-service pages described here. Contributor Relations also offers Outreach, another self-service application that enables traveling development officers to access accumulated prospect action and strategy information. Outreach is part of PeopleSoft Enterprise Campus Self Service.

See *PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook*, "Using Self-Service Outreach".

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

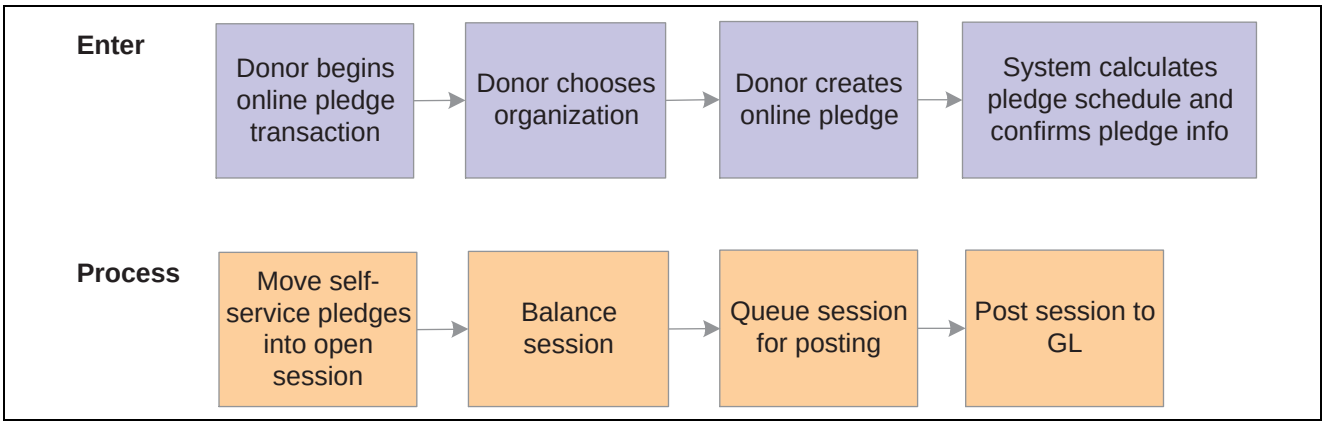
See Also

Chapter 18, "Processing Commitments," Understanding Credit Card Processing, page 377

"PeopleSoft Credit Card Interlink Installation and Technical Notes" on PeopleSoft Customer Connection

Understanding Self-Service Online Pledges

After 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

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 provides an overview of secure online giving and 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.

Navigating in Self-Service Involvement

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 21, “Working with Self-Service Involvement,” Choosing a Way to Give, page 476

Chapter 21, “Working with Self-Service Involvement,” Monitoring Self-Service Commitment Summary, page 481

Chapter 21, “Working with Self-Service Involvement,” Monitoring Self-Service Giving Club Progress, page 481

Chapter 21, “Working with Self-Service Involvement,” Monitoring Self-Service Membership History, page 482

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 7, “Setting Up Commitment Management,” Setting Up Self-Service Online Giving and Pledges, page 109

Pages Used to Give Online to the Institution

Page Name	Object Name	Navigation	Usage
Donations − Choose Organization	AV_INVLV_G_INST	Self Service, Involvement, Ways to Give Click an organization name link.	Donors select an organization to receive their donation.
Ways to Give	AV_INVLV_G_WAYS	• Self Service, Involvement, Ways to Give • Click a link under the Description heading on the Donations − Ways to Give 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 on-line 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 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. The following 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 7, "Setting Up Commitment Management," Defining Giving Vehicles, page 119

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. When 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 navigates 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

When 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 18, "Processing Commitments," Processing Credit Card Transactions, page 389

Viewing Payment Results

After 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 Contributor Relations Acknowledgement process.

If the payment is not successful, the Payment Result page displays an error message.

See Also

Chapter 18, "Processing Commitments," Generating Acknowledgement Letters, page 414

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. When 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 Make a Pledge Online

Page Name	Object Name	Navigation	Usage
Donations − Ways to Give	AV_INVLV_G_WAYS	Self Service, Involvement, 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	• 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.

When 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	Self Service, Involvement, My Involvement, Commitment Summary	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.

Viewing a Commitment Summary

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	Self Service, Involvement, My Involvement, 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 Monitor Self-Service Membership History

Page Name	Object Name	Navigation	Usage
Membership History	AV_SS_P_MB_ORG, AV_SS_P_MBR_INQ	Self Service, Involvement, My Involvement, My Memberships	View information about their participation in member organizations at the institution.

Generating Self-Service Gift and Pledge Sessions

This section lists prerequisites and discusses how to generate sessions of self-service gifts and pledges.

Prerequisites

To generate self-service gift and pledge sessions, unprocessed, authorized self-service credit card gift or pledge transactions must exist in the system.

Page Used to Generate Self-Service Gift and Pledge Sessions

Page Name	Object Name	Navigation	Usage
Self Service Giving	AV_RUNCTL_INVLV	Contributor Relations, Session Management, Process Sessions, Process Self Service Giving	Run the process that moves self-service gifts and pledges into open self-service sessions.

Creating Self-Service Gift and Pledge Sessions (AV_INV_SESS)

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 Application Engine process at user-defined intervals. When 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

After 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 selected 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 17, “Entering Commitments,” Creating and Working with Sessions, page 327

Chapter 18, “Processing Commitments,” Queuing Sessions for Posting, page 379

Chapter 18, “Processing Commitments,” Processing and Posting Sessions, page 381

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

After you have posted a credit card gift to the general ledger, you can then process it through the third-party payment processor, CyberSource. 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 18, "Processing Commitments," Understanding Credit Card Processing, page 377

Prerequisites

To process self-service credit card transactions, the following conditions must exist:

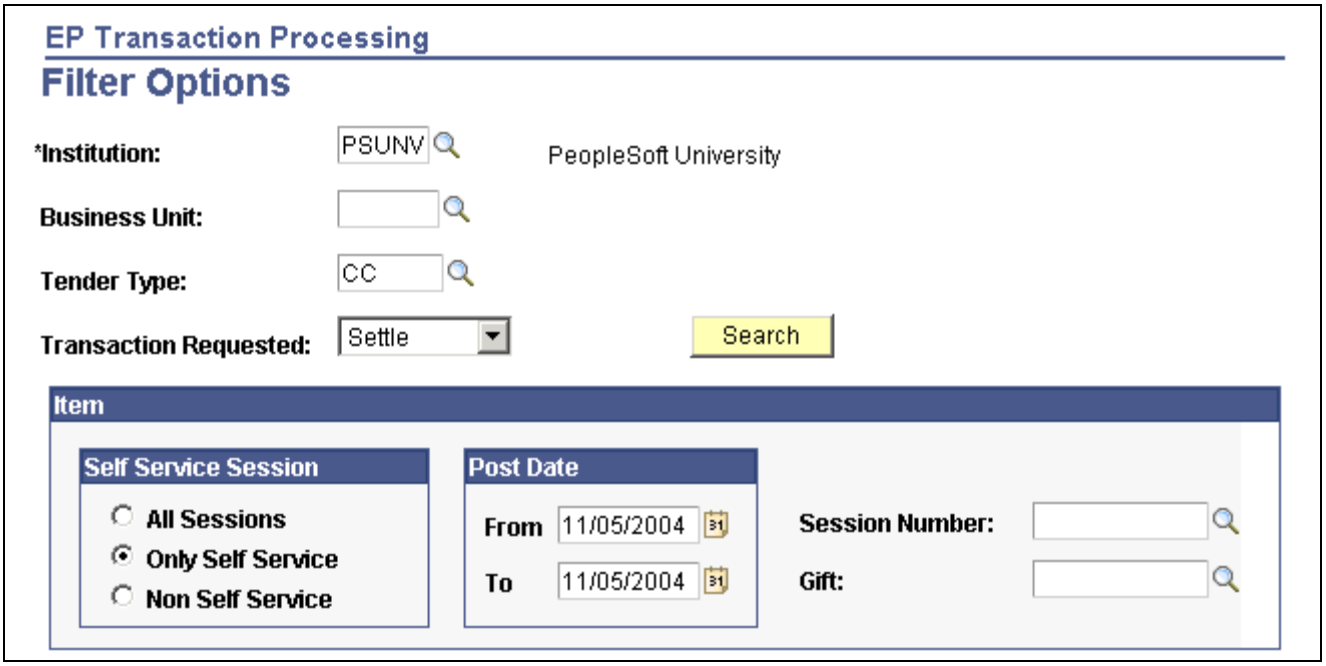
- Before you can select transactions for processing, using the EP Transaction Processing – Filter Options page, posted gift sessions must exist with the tender type of *Credit Card*.
- Before you can settle transactions, using the EP Transaction Processing – Transaction List page, valid, posted gift 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	Contributor Relations, Session Management, Process Electronic Payments, 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.

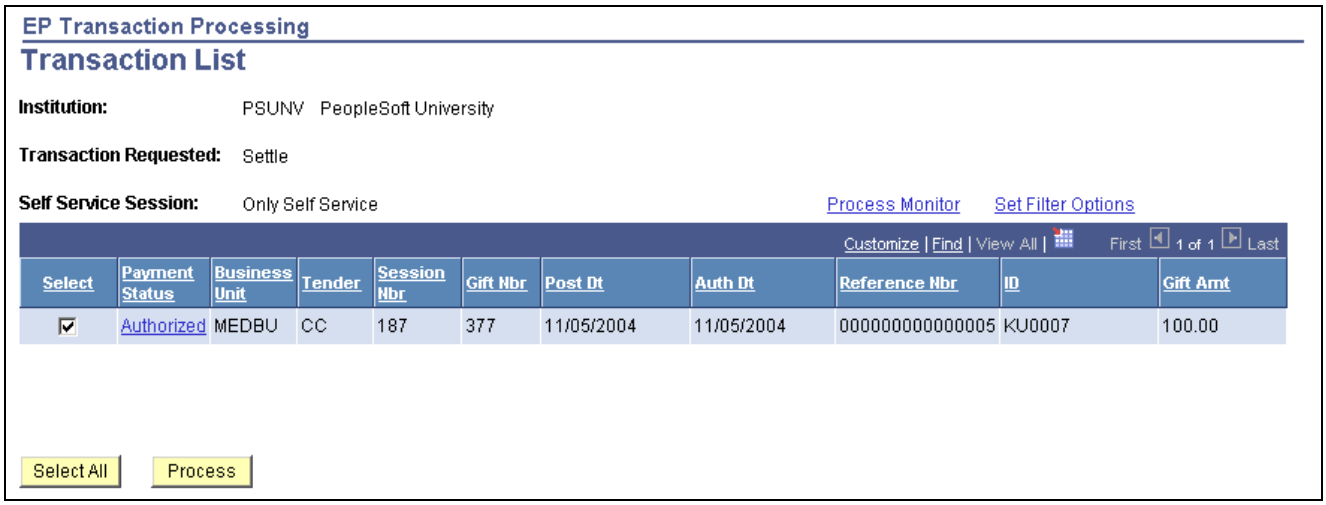
Session Number Enter a session number to select gifts made in this specific session only. To display a session, you must enter a business unit.

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 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 *Authorized.*

Auth Dt (authorization date)	After the transaction is authorized, the system populates this field.
Reference Nbr (reference number)	After 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. **Important!** After you click the Process button, give the process at least 30 seconds to run.
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 the 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:

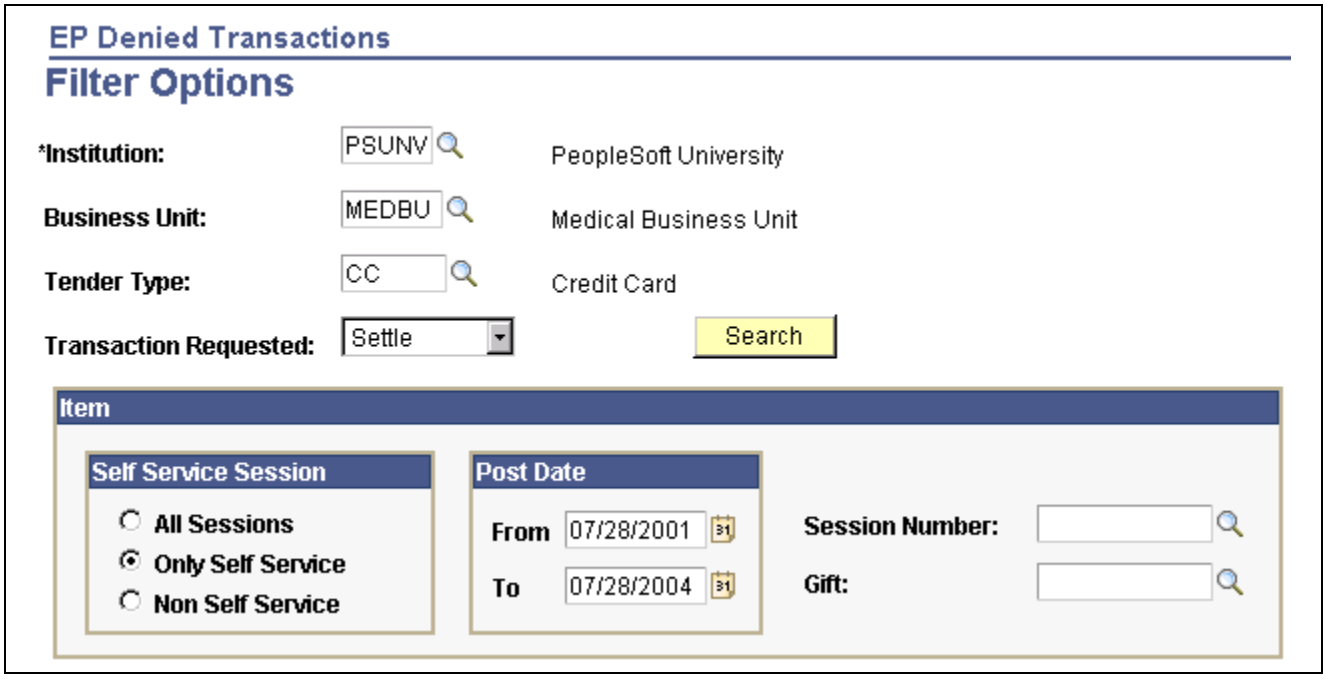
- Select denied self-service gift transactions.
- Settle denied self-service gift transactions.

Pages Used to Work with Denied Self-Service Transactions

Page Name	Object Name	Navigation	Usage
EP Denied Transactions − Filter Options	AV_EP_FLTR	Contributor Relations, Session Management, Process Electronic Payments, 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 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 the 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.

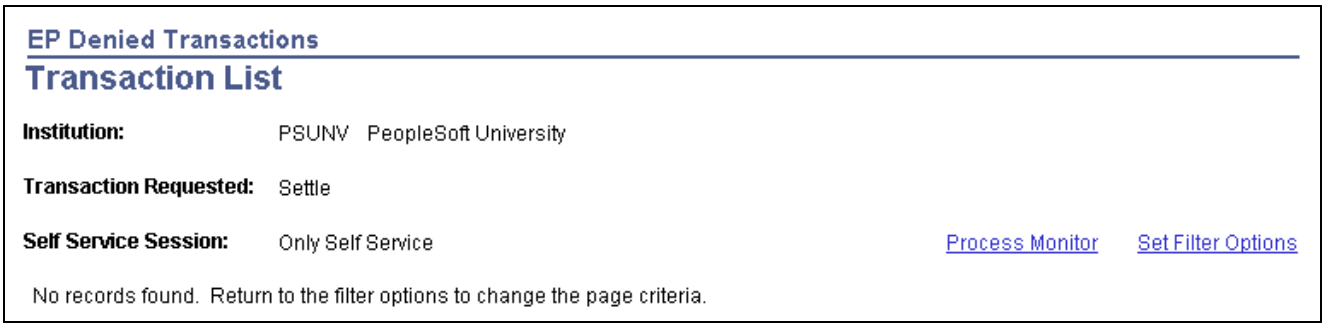
See Also

Chapter 18, “Processing Commitments,” Selecting Gift and Membership Transactions for Processing, page 393

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 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 the 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. After 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 18, "Processing Commitments," Settling Gift and Membership Transactions, page 396

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 17, “Entering Commitments,” Adjusting Gifts and Matching Gifts, page 352

Chapter 18, “Processing Commitments,” Selecting Gift and Membership Transactions for Processing, page 393

Chapter 18, “Processing Commitments,” Settling Gift and Membership Transactions, page 396

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 lists prerequisites and 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

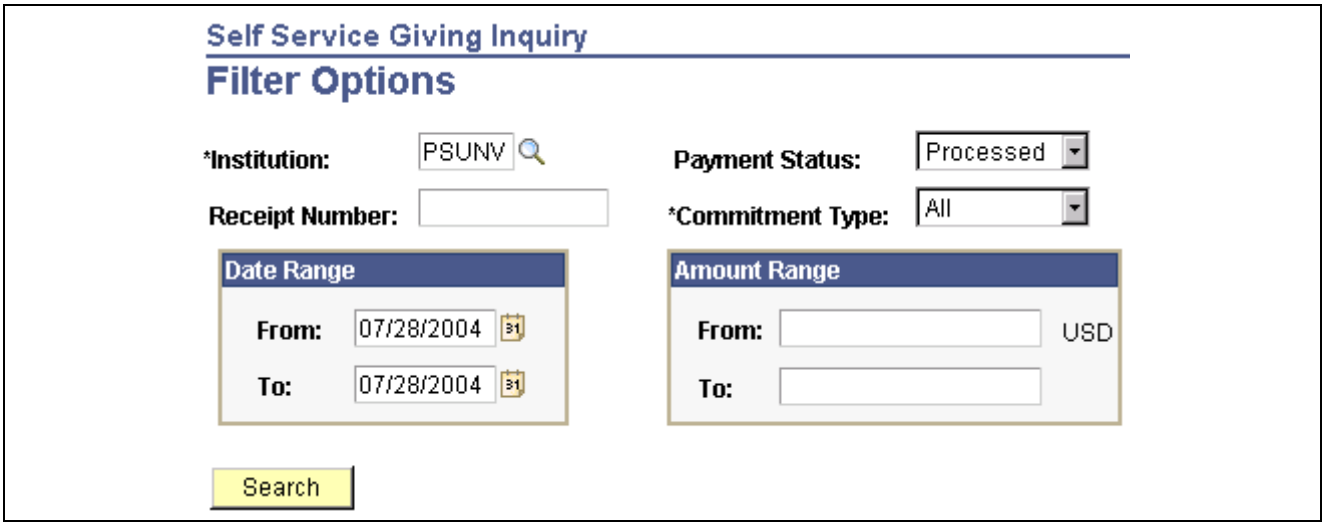
Before you can search for and view self-service gift transactions, you must make sure that self-service transactions exist in the system.

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	Contributor Relations, Session Management, Supervise Sessions, Self Service Giving Summary	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	Contributor Relations, Session Management, Process Electronic Payments, 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 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 are 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 the third-party credit card payment processor.

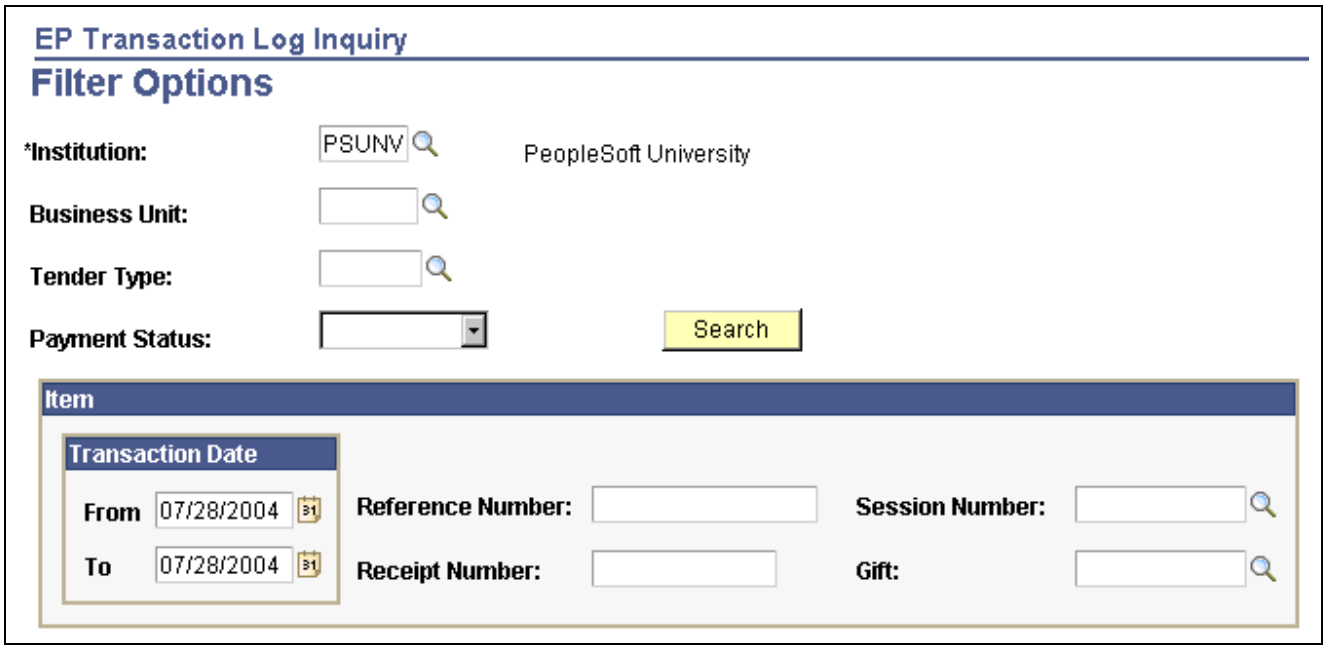
This page lists the gift transaction information sent to and from the third-party credit card payment processor. It displays the credit card and personal information the contributor entered, such as Credit Card Type, encrypted Credit Card Number, Expiration Date, cardholder Name and Address information, 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, the third-party credit card payment processor. The Service Provide is the name of the 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 the 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. Contributor Relations retains a historical record of all credit card activity that you can filter and review.



EP Transaction Log Inquiry - Filter Options page

This page is primarily used by 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 18, "Processing Commitments," Understanding Credit Card Processing, page 377

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 the 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 the 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.

APPENDIX A

AV_GP_LOAD_TBL Data Fields

This appendix provides detailed information about the data fields in the AV_GP_LOAD_TBL. The system accesses these fields during the Mass Load Gift/Pledge COBOL process (AVPGPLOA). The details for each field enable you to create a custom API to move gift and pledge information into the AV_GP_LOAD_TBL.

Data Field Details

Use the values in the following table to create your custom API.

Line Nbr	Column Name	Type	MSSQL Length	Pre-cision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
1	BUSINESS_UNIT	Char KEY	5			This is the business unit for the session.	PSUNV	PSUNV
2	SEQ_NBR	decimal KEY	9	15	0	A unique, consecutive number that identifies a row of data to be processed in the AVPGPLOA process.	1	2
3	AV_SESS_TYPE	char KEY	2			The type of session to be created. Valid values are: G = Gift session PL = Pledge session. **Note.** Gift sessions can handle only outright gifts with no links to an existing pledge. Pledge sessions only process new pledges. Pledge payments should not be entered through this process, but must be entered through the online process to ensure update of the pledge records and pledge schedules.	G	PL
4	EMPLID	char	11			The ID number of the person who is making the gift or pledge. **Note.** If this field is entered, the EXT_ORG_ID field (Line 5) must be blank.	AV0027	*Leave blank*
5	EXT_ORG_ID	char	11			The ID number of the organization who is making the gift or pledge. **Note.** If this field is entered, the EMPLID field (Line 4) must be blank.	*Leave blank*	AV1019
6	GIFT_AMT	decimal	9	15	2	The monetary amount of the gift or pledge.	1000.00	12000.00

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Line Nbr	Column Name	Type	MSSQL Length	Pre-cision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
7	GIFT_TYPE	char	6			For Gift Session (AV_SESS_TYPE = 'G'), enter 'GIFT' only. No other gift types are valid. Otherwise, leave blank.	GIFT	*Leave blank*
8	PLEDGE_GIFT_NO	char	11			This field exists for future development and is not used in the current process.		
9	FISCAL_YEAR	smallint	2	5	0	The financial year during which the gift or pledge is to be counted.	2003	2003
10	GIFT_DT	PSDATE	8			The date of record for the gift or pledge.	01-01-2003	01-01-2003
11	TENDER_TYPE	char	6			The payment method for the gift. Must be a valid value from the AV_TENDER_TBL. **Note.** The tender type must be valid for the session business unit. A tender type is valid only if it is current and has a setID that correlates to the corresponding set control value for record group AV02_GIFT for BUSINESS_UNIT (Line1).	CHK	*Leave blank*
12	CURRENCY_CD	char	3			The type of money being used to pay the gift, for example U.S. Dollars or Euros. **Note.** Pledges are always entered in the base currency of the institution.	USD	*Leave blank*

Line Nbr	Column Name	Type	MSSQL Length	Pre-cision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
13	CHECK_NO	char	10			For Gift Session (AV_SESS_TYPE = 'G'), the number of the donor's check if the tender is a check. **Note.** If a check number is entered, the credit card fields (Lines 14-17) must be blank since a gift has only one tender type.	*Leave blank*	*Leave blank*
Important! The following four fields do not feed into the automated credit card process. If you want to have your credit card transactions put through that process, do not complete these four fields. Enter the credit card information online into the sessions created after the Gift/Pledge Load process has been run.								
14	CREDIT_CARD_NO	char	20			The credit card number to which the donor is charging the gift. **Note.** This field is not secured and can be queried using a database query tool. Also, this field should be empty if CHECK_NO (Line13) has data.	4111111111111111	*Leave blank*
15	CREDIT_CARD_ HOLDER	char	30			The exact name on the credit card entered in CREDIT_CARD_NO (Line 14). **Note.** This field is not secured and can be queried using a database query tool. Also, this field should be empty if CHECK_NO (Line13) has data.	Lisele Boudreaux	*Leave blank*

Line Nbr	Column Name	Type	MSSQL Length	Pre-cision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
16	CREDIT_CARD_ TYPE	char	2			The type of credit card being used to charge the gift. Must be a valid value from the CREDIT_CARD_TYPE xlat values. Delivered values include: • AE = American Express • DC = Diners' Club • DI = Diners' Club • MC = Master Card • VI = Visa **Note.** This field is not secured and can be queried using a database query tool. Also, this field should be empty if CHECK_NO (Line13) has data.	VI	*Leave blank*
17	CREDIT_CARD_ EXP_DT	PSDATE	8			The date on which the credit card is no longer valid. Must be entered in the format required by the database platform. **Note.** This field is not secured and can be queried using a database query tool. Also, this field should be empty if CHECK_NO (Line13) has data.	09-01-2006	*Leave blank*
18	TENDER_TYPE_ NOTE	char	50			Short comment related to the gift tender.		*Leave blank*
19	CAE_GIFT_TYPE	char	1			Used only when AV_SESS_TYPE (line 3) = 'G'. Must be the CAE Type for the GIFT_TYPE (Line 7). Delivered value = 'G'.	G	*Leave blank*

Line Nbr	Column Name	Type	MSSQL Length	Pre-cision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
20	PLDG_EFFDT	PSDATE	8			The date that the pledge is considered active. Can be in the future.	*Leave blank*	01-15-2003
21	PLEDGE_DT	PSDATE	8			The date that the first pledge payment is expected. The date must be on or after the PLDG_EFFDT (Line 20).	*Leave blank*	02-01-2003
22	FULF_DT	PSDATE	8			The date on which the entire commitment amount for a pledge is expected to be fulfilled.	*Leave blank*	12-31-2003
23	PLEDGE_PMT_ RCVD	decimal	9	15	2	This field exists for future development and is not used in the current process.		
24	LAST_PMT_DT	PSDATE	8			This field exists for future development and is not used in the current process.		
25	CP_PLEDGE_NO	char	11			This field exists for future development and is not used in the current process.		
26	FEED_FLG	char	1			Only used when AV_SESS_TYPE (Line 3) = 'PL'. Indicates whether a pledge should be sent to the GL Interface to be tracked as an account receivable.	*Leave blank*	Y
27	AV_PLDG_STATUS	char	1			This field exists for future development and is not used in the current process.		
28	PLEDGE_PG_TYPE	char	2			This field exists for future development and is not used in the current process.		

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Line Nbr	Column Name	Type	MSSQL Length	Pre-cision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
29	RCG_EMPLID1	char	11			These four fields identify up to four persons who are to receive credit for the gift or pledge. The EMPLID (Line 4) is not required to be one of these four IDs if he/she is not receiving direct credit for the gift (for example a third-party agent representing these RCG_EMPLIDs would not be entered). **Note.** If an entry has data in this field, it cannot have an entry in its corresponding RCG_EXT_ORG_ID field, that is if RCG_EMPLID1 (Line 29) has a value, RCG_EXT_ORG_ID1 (line 33) cannot and vice versa.	AV0027	
30	RCG_EMPLID2	char	11				AV0026	AV0023
31	RCG_EMPLID3	char	11				AV0025	
32	RCG_EMPLID4	char	11				AV0024	

Line Nbr	Column Name	Type	MSSQL Length	Pre-cision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
33	RCG_EXT_ORG_ID1	char	11			These four fields identify up to four organizations that are to receive credit for the gift or pledge. The EXT_ORG_ID (Line 5) is not required to be one of these four IDs if it is not receiving direct credit for the gift (for example a third-party agent representing these RCG_EXT_ORG_IDs would not be entered). **Note.** If an entry has data in this field, it cannot have an entry in its corresponding RCG_EMPLID field, that is if RCG_EXT_ORG_ID (Line 33) has a value, RCG_EMPL_ID1 (Line 29) cannot and vice versa.		AV1019
34	RCG_EXT_ORG_ID2	char	11					
35	RCG_EXT_ORG_ID3	char	11					
36	RCG_EXT_ORG_ID4	char	11					
37	RECOGNITION_ TYPE1	char	1			The type of credit (recognition) that the donor in RCG_EMPLID1 (Line 29) or RCG_EXT_ORG_ID1 (Line 33) is receiving for the gift or pledge. Must have a valid value from the AV_RCG_TYPE_TBL and the total of all Recognition Types 1-4 (Lines 37-40) that are given a value of ‘H” for hard credit must equal 100% of the GIFT_AMT (Line 6).	H	H

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Line Nbr	Column Name	Type	MSSQL Length	Pre-cision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
38	RECOGNITION_ TYPE2	char	1			The type of credit (recognition) that the donor in RCG_EMPLID2 (Line 30) or RCG_EXT_ORG_ID2 (Line 34) is receiving for the gift or pledge. Must have a valid value from the AV_RCG_TYPE_TBL and the total of all Recognition Types 1-4 (Lines 37-40) that are given a value of 'H" for hard credit must equal 100% of the GIFT_AMT (Line 6).	H	S
39	RECOGNITION_ TYPE3	char	1			The type of credit (recognition) that the donor in RCG_EMPLID3 (Line 31) or RCG_EXT_ORG_ID3 (Line 35) is receiving for the gift or pledge. Must have a valid value from the AV_RCG_TYPE_TBL and the total of all Recognition Types 1-4 (Lines 37-40) that are given a value of 'H" for hard credit must equal 100% of the GIFT_AMT (Line 6).	S	
40	RECOGNITION_ TYPE4	char	1			The type of credit (recognition) that the donor RCG_EMPLID4 (Line 32) or RCG_EXT_ORG_ID4 (Line 36) is receiving for the gift or pledge. Must have a valid value from the AV_RCG_TYPE_TBL and the total of all RECOGNITION_TYPEs 1-4 (Lines 37-40) that are given a value of 'H" for hard credit must equal 100% of the GIFT_AMT (Line 6).	S	

Line Nbr	Column Name	Type	MSSQL Length	Pre-cision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
41	RCG_PCT_AMT1	decimal	9	15	2	The amount of the gift that is to be recognized as coming from each of the Recognition IDs (Lines 29-36). The sum of the amounts entered in these four fields must equal the total gift amount (Line 6) for all IDs receiving recognition types equal to 'H' (hard credit). Soft credit (any that are not equal to 'H') can total any amount up to the gift amount (Line 6).	500.00	12000.00
42	RCG_PCT_AMT2	decimal	9	15	2		500.00	12000.00
43	RCG_PCT_AMT3	decimal	9	15	2		1000.00	
44	RCG_PCT_AMT4	decimal	9	15	2		1000.00	
45	ANONYMOUS_ FLG1	char	1			Enter 'Y" if the donor in RCG_EMPLID1 (Line 29) or RCG_EXT_ORG_ID1 (Line 33) desires no public acknowledgement of the gift or pledge.		Y
46	ANONYMOUS_ FLG2	char	1			Enter 'Y" if the donor in RCG_EMPLID2 (Line 30) or RCG_EXT_ORG_ID2 (Line 34) desires no public acknowledgement of the gift or pledge.		
47	ANONYMOUS_ FLG3	char	1			Enter 'Y" if the donor in RCG_EMPLID3 (Line 31) or RCG_EXT_ORG_ID3 (Line 35) desires no public acknowledgement of the gift or pledge.		

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Line Nbr	Column Name	Type	MSSQL Length	Pre-cision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
48	ANONYMOUS_ FLG4	char	1			Enter 'Y" if the donor in RCG_EMPLID4 (Line 32) or RCG_EXT_ORG_ID4 (Line 36) desires no public acknowledgement of the gift or pledge.		
49	DESIGNATION1	char	11			The account or fund code to which the donor is giving the gift or making the pledge. A gift or pledge can be split across 1-4 accounts when processed through AVPGPLOA. **Note.** A designation is valid only if it is current and has a setID that correlates to the corresponding set control value for record group AV02_GIFT for AV_DES_BU 1-4 (Lines 53-56).	MEDBLDG	MEDBLDG
50	DESIGNATION2	char	11				LIBRARY	
51	DESIGNATION3	char	11					
52	DESIGNATION4	char	11					
53	AV_DES_BU1	char	5			The business unit that owns DESIGNATION1.	MEDBU	MEDBU
54	AV_DES_BU2	char	5			The business unit that owns DESIGNATION2.	PSUNV	
55	AV_DES_BU3	char	5			The business unit that owns DESIGNATION3.		
56	AV_DES_BU4	char	5			The business unit that owns DESIGNATION4.		

Line Nbr	Column Name	Type	MSSQL Length	Pre-cision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
57	INTV_CD1	char	10			The campaign that generated the gift or pledge to DESIGNATION1 (Line 49).	CMPGN2003	CMPGN2003
58	INTV_CD2	char	10			The campaign that generated the gift or pledge to DESIGNATION2 (Line 50).	CMPGN2003	
59	INTV_CD3	char	10			The campaign that generated the gift or pledge to DESIGNATION3 (Line 51).		
60	INTV_CD4	char	10			The campaign that generated the gift or pledge to DESIGNATION4 (Line 52).		
61	DES_PCT_AMT1	decimal	9	15	2	The amount of the gift that is being distributed to each designation (Lines 49-52) The total of the amounts entered in these four fields must equal the total gift amount (Line 6).	500	12000
62	DES_PCT_AMT2	decimal	9	15	2		500	
63	DES_PCT_AMT3	decimal	9	15	2			
64	DES_PCT_AMT4	decimal	9	15	2			
65	MOTIVATION_CD1	char	9			The appeal that generated the gift or pledge given to DESIGNATION1 (Line 49). **Note.** An appeal is valid only if it is current and has a setID that correlates to the corresponding set control value for record group AV02_GIFT for AV_DES_BU 1-4 (Lines 53-56).	MEDICINE	MEDICINE

Line Nbr	Column Name	Type	MSSQL Length	Pre-cision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
66	MOTIVATION_CD2	char	9			The appeal that generated the gift or pledge given to DESIGNATION2 (Line 50). **Note.** An appeal is valid only if it is current and has a setID that correlates to the corresponding set control value for record group AV02_GIFT for AV_DES_BU 1-4 (Lines 53-56).	LIBRARY	
67	MOTIVATION_CD3	char	9			The appeal that generated the gift or pledge given to DESIGNATION3 (Line 51). **Note.** An appeal is valid only if it is current and has a setID that correlates to the corresponding set control value for record group AV02_GIFT for AV_DES_BU 1-4 (Lines 53-56).		
68	MOTIVATION_CD4	char	9			The appeal that generated the gift or pledge given to DESIGNATION4 (Line 52). **Note.** An appeal is valid only if it is current and has a setID that correlates to the corresponding set control value for record group AV02_GIFT for AV_DES_BU 1-4 (Lines 53-56).		

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Line Nbr	Column Name	Type	MSSQL Length	Pre-cision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
69	CHARITABLE_ AMT1	decimal	9	15	2	The amount of the gift to DESIGNATION 1-4 (Lines 49-52) that is considered charitable for tax purposes. This can be different than the GIFT_AMT, but a value must be entered here even if it is equal to the GIFT_AMT. The total of the amounts entered in these four fields cannot exceed the total gift amount (Line 6).	500	12000
70	CHARITABLE_ AMT2	decimal	9	15	2		500	
71	CHARITABLE_ AMT3	decimal	9	15	2			
72	CHARITABLE_ AMT4	decimal	9	15	2			
73	DESCR254	char	254			*PROCESS GENERATED − Do not enter any values.* Suspense Reason created by AVPGPLOA.	*Leave blank*	
74	COMPLETE_FLAG	char	1			*PROCESS GENERATED − Do not enter any values.* Indicates if session has been processed by AVPGPLOA.	*Leave blank*	
75	GP_LOAD_STATUS	char	1			*PROCESS GENERATED − Do not enter any values.* Indicates whether the gift or pledge was processed or suspended by AVPGPLOA.	*Leave blank*	

Line Nbr	Column Name	Type	MSSQL Length	Pre-cision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
76	SESSION_NO	char	11			*PROCESS GENERATED − Do not enter any values.* Session Number created by AVPGPLOA.	*Leave blank*	
77	GIFT_NO	char	11			*PROCESS GENERATED − Do not enter any values.* Gift Number created by AVPGPLOA.	*Leave blank*	

APPENDIX B

Delivered Workflows for Contributor Relations

This appendix discusses delivered workflows for Contributor Relations.

See Also

Enterprise PeopleTools PeopleBook: Workflow Technology

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Delivered Workflows for Contributor Relations

This section discusses Contributor Relations workflows. The workflows are listed alphabetically by workflow name.

Send BioDemo Update

This section discusses the workflow that sends email notifications of biodemographic updates in PeopleSoft Outreach.

See *PeopleSoft Enterprise Campus Self Service 8.9 PeopleBook*, "Using Self-Service Outreach," Sending Updated Biographic Information.

Description

Event Description	A development officer often learns new address or other biodemographic data during contact with a prospect. This workflow allows the officer to send the new information on to the person responsible for record updates at the point when the contact report is being written.
Action Description	The development officer completes an action and prepares to enter the contact report. From the contact report, the officer clicks the Send Biodemo Update button to create the email text. The system sends the email workflow when the user clicks the Send button.
Notification Method	The system sends an email notification with the biodemographic information update to the specified person(s) who handle record updates. Fields utilized in the email text include: Constituent ID, Constituent Name, and the sender's Name. The user can edit the information that appears by default on the Send Contact Report page.

Workflow Objects

Event	AV_OUTR_BIO_SEND Page PeopleCode
Workflow Action	This workflow starts manually when the user clicks the Send button.
Role	Development Officer
Email Template	AV_OUTR_BIO_SEND delivers an email notification to the specified recipient's inbox with the Subject: Biodemo Update for Emplid: EMPLID, Constituent's Name. The email text includes the name of the sender.
Business Process	AV_OUTR_SEND
Business Activity	AV_OUTR_SEND Outreach Send Data includes three steps: 1) Submit Data, 2) Trigger email Biodemo Data, 3) Email Outreach Data
Business Event	Send Biodemo Update

Send Contact Report

This section discusses the workflow that distributes contact reports, with added comments, through email notifications.

See Chapter 9, "Managing Prospects," Writing a Contact Report, page 197.

Description

Event Description	When a development officer completes a constituent action or contact with a prospect, the officer summarizes the results and information gathered in a contact report. This workflow allows the officer to send the contact report to individuals who have an interest in the outcome of the action. It includes the ability to alter the report prior to sending, adding explanatory text or removing sensitive information that should not be widely distributed.
Action Description	The development officer completes an action and its related contact report. From the contact report, the officer clicks the Send Report button to create the email text. The system begins the email workflow when the user clicks the Send button.
Notification Method	The system sends an email notification with the contact report information update to the specified recipients. Fields utilized in the email text include: Constituent Name, a description of the related Constituent Action, the sender's Name, and the contact report text. The user can edit the information that defaults on the Send Contact Report page.

Workflow Objects

Event	AV_OUTR_BIO_SEND Page PeopleCode
Workflow Action	This workflow starts manually when the user clicks the Send button.
Role	Development Officer
Email Template	AV_OUTR_CNCT_SEND delivers an email notification to the specified recipient's inbox with the Subject: Contact Report for Constituent's Name — Action Description from completed action. Email text includes the name of the sender and the body of the contact report.
Business Process	AV_OUTR_SEND
Business Activity	AV_OUTR_SEND Outreach Send Data includes three steps: 1) Submit Data, 2) Trigger email Biodemo Data, 3) Email Outreach Data
Business Event	Send Report

APPENDIX C

PeopleSoft Contributor Relations Reports

This appendix provides an overview of 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

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

Contributor Relations Reports: A to Z

This table lists the 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)	Contributor Relations, Constituent Information, People, Process Biodemo Information, Graduates to Alumni	AV_RUNCTL_CONFR
AV703 Pledge Schedule Aging	Lists past-due pledge amounts by time period and business unit. (Crystal)	Contributor Relations, CR Reports, Giving Reports, Pledge Schedule Aging	AV_RUNCTL_PLAGE
AVBIOBIT, AVORGBIO Biographic Profile	Generate standard or customized bio bits and briefs to summarize information about prospects in the system. (Crystal)	• Contributor Relations, CR Reports, Biographic Reports, Biographic Profile • Contributor Relations, CR Reports, Biographic Reports, Biographic Profile - Org • Contributor Relations, CR Reports, Biographic Reports, Biographic Profile - Workset	AV_BIO_BIT_RPT (person), AV_BIO_BIT_RPT_E (org), AV_BIO_BIT_RPT_W (workset)

Report ID and Report Name	Description	Navigation	Run Control Page
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)	Contributor Relations, CR Reports, Giving Reports, 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)	Contributor Relations, CR Reports, Giving Reports, Designation Donor List	AV_RUNCTL_DESDN
AVGCINIT Giving Club Initialization report	Summarizes differences for all giving clubs active as of the process date, ordered by giving club and fiscal year. Also helps to identify differences between prior giving club data and recalculated data so that you can review and add memberships. (SQR)	Contributor Relations, Session Management, Giving Clubs, Process Giving Clubs	AV_RUNCTL_GCLUBS
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)	Contributor Relations, CR Reports, Giving Reports, CAE Report	AV_RUNCTL_CAE
AVROLE Role Assignments report	Summarizes information about the prospect assignments for a resource for a particular role. (SQR)	Contributor Relations, CR Reports, Role Assignments	AV_RUNCTL_ROLE

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 8, "Managing Constituent Data," Running the Graduates to Alumni Process, page 130

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 9, “Managing Prospects,” Creating a Biographic Profile, page 183

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 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.

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 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 that 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 12, “Managing Campaigns,” Generating the Campaign Progress Report, page 264

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 19, “Analyzing Giving History,” Generating Designation Donor Reports, page 452

AVGCINIT – Giving Club Initialization Report

This report can be generated as part of the Process Giving Clubs process. The process generates giving club memberships and calculates membership levels based on donors' giving. The report compares the backed up data in the system to the newly generated giving club member data based on the options you select on the Process Giving Clubs page.

See Also

Chapter 18, "Processing Commitments," Generating Giving Club Memberships, page 430

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 fundraising 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. Note the following about outright gifts for current operations:

- 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. Note the following about outright gifts for capital purposes:

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 fundraising 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, 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.

   Contributor Relations is not connected to the Endowment Tracking or Budget Expenditures systems. You must manually enter values for this section.

See Also

Chapter 18, "Processing Commitments," Generating CAE Reports, page 435

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 *Prospect Manager, Campaign Manager,* 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.

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 9, “Managing Prospects,” Generating the Role Assignments Report, page 170

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.

academic career In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).

academic institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

academic organization In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.

academic plan In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.

academic program In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.

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 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.

action template In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

address usage In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

agreement In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

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.

analysis database In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on

courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.

Application Messaging PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft and third-party applications. An application message defines the records and fields to be published or subscribed to.

AR specialist Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.

arbitration plan In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.

assessment rule In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.

asset class An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attribute/value pair In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.

audience In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.

authentication server A server that is set up to verify users of the system.

base time period In PeopleSoft Business Planning, the lowest level time period in a calendar.

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.

billing career In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.

bio bit or bio brief In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.

book In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

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 activity The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.

business event In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

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).

business process A standard set of 17 business processes are defined and maintained by the PeopleSoft product families and are supported by Business Process Engineering group at PeopleSoft. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.

See also *detailed business process.*

business task The name of the specific function depicted in one of the business processes.

business unit A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

campus In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.

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. A catalog item can have one or more learning activities.

catalog map In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company’s catalog.

catalog partner In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

category In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.

channel In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

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.

checkbook In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

checklist code In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.

class In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.

See also *course.*

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 *sub-classification.*

clearance In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.

clone In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

cohort In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *division*.

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.

collection rule In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

comm key See *communication key.*

communication key In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.

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.

component interface A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft database information using a program instead of the PeopleSoft client.

condition In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

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.

constituents In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).

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 PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.

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.

control table Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

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.

course In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class*.

course share set In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

current learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

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 cube In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.

data elements Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

dataset A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

detailed business process A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.

dimension In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.

directory information tree In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

division In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.

See also *population* and *cohort*.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are 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 ledger Abbreviation for *Enterprise Incentive Management ledger.* 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.

elimination set In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

equity item limit In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects 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.

exception In PeopleSoft Receivables, an item that either is a deduction or is in dispute.

exclusive pricing In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

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.

financial aid term In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.

forecast item A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

fund In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

gap In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.

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.

gift table In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.

GL business unit Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.

See also *business unit*.

GL entry template Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.

GL Interface process Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.

group In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

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.

incur In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

initiative In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.

inquiry access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.

See also *update access.*

institution In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.

integration A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft applications to work seamlessly with other PeopleSoft applications or with third-party systems or software.

integration point An interface that a system uses to communicate with another PeopleSoft application or an external application.

integration set A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.

item In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

item shuffle In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

joint communication In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.

learner group In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

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 *rates*) 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.

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.

LMS Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

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 *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

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.

mass change In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.

See also *3C engine*.

match group In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL Meta-SQL constructs expand into platform-specific Structured Query Language (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 In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

national allowance In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

need In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package

	is based on the amount of financial need. The process of determining a student's need is called *need analysis.*
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page 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.
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 *compensation object.*
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	See *event.*
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (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.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
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 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.

planned learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.

planning instance In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

population In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it.

See also *division* and *cohort*.

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.

price list In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.

price rule In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.

price rule key In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

primacy number In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.

primary name type In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

process category In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

process group In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.

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 a Structured Query Report (SQR), a COBOL or Application Engine 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 A PeopleSoft or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products are displayed with the product name and release number.

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.

product family A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified PeopleSoft partners.

product line The name of a PeopleSoft product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

prospects

In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.

In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.

publishing

In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

rating components

In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.

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 *record input value-added tax flag.* 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 *record output value-added tax flag.*

See *record input VAT flag.*

recname

The name of a record that is used to determine the associated field to match a value or set of values.

recognition

In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.

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.

regional sourcing

In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

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.

remote data source data Data that is extracted from a separate database and migrated into the local database.

REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

reversal indicator In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.

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.

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.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

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.

SCP SCBM XML message Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* PeopleSoft EnterpriseOne Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.

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.

search/match In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

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.

serial genealogy In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

service impact In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.

service indicator In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.

session In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.

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.

share driver expression In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

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 key process In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.

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.

speed key See *communication key.*

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.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

standard letter code In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.

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.

storage level In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

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 time period In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

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 *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

tax authority In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.

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.

third party A company or vendor that has extensive PeopleSoft product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft applications.

3C engine Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.

3C group Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.

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.

trace usage In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

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 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.

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.

tuition lock In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

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.

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.

update access In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access.*

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.

VAT exception Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

warehouse A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.

worker A person who is part of the workforce; an employee or a contingent worker.

workset A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.

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.

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.

XML link The XML Linking language enables you to insert elements into XML documents to create a links between resources.

XML schema An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

XPI Abbreviation for *eXtended Process Integrator.* PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with EnterpriseOne applications.

yield by operation In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

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. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

Index

Numerics/Symbols

3C engine 252, 411, 419

A

Account Details page 438
accounting entry definitions 89
Accounting Line page 402, 467
accounting lines, viewing 402
accumulators, *See* constituents, accumulators
Acknowledge Suspense page 415, 416
Acknowledgement Detail page 415, 416
Acknowledgement List page 415, 418
Acknowledgement Setup component (AV_ACKNLDG_SETUP) 94
Acknowledgement Setup1 page 95
Acknowledgement Setup2 page 95, 96
Acknowledgement Setup3 page 95, 96
acknowledgements
  defining rules 94
  generating letters 414
    See Also letters
  generating manually 415
  illustrating the acknowledgement process 411
  managing 411
  managing joint communications 419
  preparing for letters and receipts 93
  processing 414
  setting defaults 10
  transferring 417
  understanding spousal relationships 412
  understanding the process 412
  viewing details 416
  viewing lists 418
  viewing suspended 416
Action Contact Type page 36, 40
Action Contact Types component (AV_ACTN_CNTC_TBL) 35
Action Detail page 188, 203, 249
Action Filter page 187, 201
Action Info page 186, 194, 246, 247
Action Results component (AV_ACTN_RSLT_TBL) 35
Action Results page 36, 41, 186, 196
action results required values 41
  See Also actions
Action Status Codes component (AV_ACTN_STAT_TBL) 35
Action Status Codes page 36
action status codes required values 41
  See Also actions
Action Status page 41
Action Summary page 188, 203
action types 39
  See Also actions
  required values 39
Action Types component (AV_ACTN_TYPE_TBL) 35
Action Types page 36, 39
action types required values 39
actions
  completing 196
  creating 245
  creating completed mass 192
  creating individual 193
  creating mass 190
  defining action results 41
  defining contact types 40, 57
  defining results 57
  defining status codes 41, 57
  defining types 39, 57
  entering information 194
  existing 203
  filtering 201
  viewing contact reports 204
  viewing summary 248
  writing contact report 197
additional documentation xxviii
Address Detail page 156
addresses
  entering electronic 126
  entering for organizations 136
  managing for people 125
  updating linked 126
  viewing data for people 126
Addresses page 126
Adjust Gift Detail page 440
Adjust Pledge Detail page 440

Adjustment Reasons (AV_ADJ_REASON_ TBL) 88
Adjustment Reasons page 88
adjustments
adjusting pledge payment schedule 369
credit card payments 356
entering for gifts 353
See Also gifts, adjusting
entering for pledges 375
See Also pledges, adjusting
membership payments 293
understanding sessions 327
Annual Goals page 259, 260, 281, 282
annuities 217
Appeal Code Table component (AV_MTVTN_TBL) 58
Appeal Detail page 58, 60
Appeal page 58, 59
Appeal Type Table component (AV_APPEAL_TYPE_TBL) 58
Appeal Types page 58, 59
appeals
defining campaign linked appeals 118
defining web 114
setting up 58
application fundamentals xxvii
appreciation items
defining for donors 42
maintaining 198
viewing items given 199
Appreciation Items component (AV_ITEM_TBL) 35
Area of Responsibility page 68, 69
Areas of Responsibility component (AV_AREA_TYP_TBL) 67
Ask Detail page 188
Asset Types component (AV_ASSET_ TBL) 35
assets
defining types 37
maintaining personal 179
viewing personal 180
Assets page 36, 37
Assignment Detail page 165
Assignment Type page 68, 69
Assignment Types component (AV_ASGN_TYP_TBL) 67
Attribute Type component (AV_ATTR_TYP) 50
Attribute Type page 51
Audience Criteria component (AV_AUD_CRIT) 50
Audience Criteria page 51, 53
Audience Detail page 233
Audience History page 150, 312
Audience page 233
audiences
building 235
defining 233
defining for initiatives 50
merging 236
selecting criteria 53
viewing constituent history 150
AV_ACKNLDG_SETUP component 94
AV_ACTN_CNTC_TBL component 35
AV_ACTN_RSLT_TBL component 35
AV_ACTN_STAT_TBL component 35
AV_ACTN_TYPE_TBL component 35
AV_ADJ_REASON_TBL component 88
AV_APPEAL_TYPE_TBL component 58
AV_AREA_TYP_TBL component 67
AV_ASGN_TYP_TBL component 67
AV_ASSET_TBL component 35
AV_ATTR_TYP component 50
AV_AUD_CRIT component 50
AV_BUDGET_TABLE component 57
AV_BUS_UNIT component 105
AV_CR_CARD_TYPE component 105
AV_CTYP_CD_TBL component 26
AV_DESIGNATIONS component 83
AV_DONOR_PHASE_TBL component 60
AV_GFT_TNDR_TBL component 79
AV_GFT_TYPE_TBL component 78
AV_GIVE_VEHICLE component 109
AV_GOAL_TYPE_TABLE component 55
AV_INST_TYP component 81
AV_INST_WEB_INV component 109
AV_INSTALL_INST component 7
AV_INSTALLATION component 3
AV_INTV_TYPE_TABLE component 49
AV_INVLV_C_TBL component 28
AV_INVLV_CD_TBL component 30
AV_INVLV_T_TBL component 29
AV_ITEM_TBL component 35
AV_LDR_TYPE_TBL component 67
AV_MBR_CAT component 65

AV_MBR_TYP component 65
AV_MERCHANT_TBL component 105
AV_METHOD_TABLE component 56
AV_MTCH_GFT_TYP component 82
AV_MTVTN_TBL component 58
AV_ORG_RELATE_TBL component 32
AV_PE_RELATION_TBL component 31
AV_PRPS component 11
AV_R_CAT_TBL component 35
AV_R_IND_TBL component 35
AV_R_TYPE_TBL component 35
AV_RCG_TYPE_TBL component 87
AV_STAFF component 11
AV_STAFF_PRPS component 11
AV_TRUST_C_TBL component 35
AV_TRUST_R_TBL component 35
AV_TRUST_T_TBL component 35
AV_UNIT_PRPS component 11
AV_UNIT_TBL component 11
AV_VOL_PRPS component 11
AV_VOLUNTEERS component 11
AV702 report 519
AV703 report 519
AVBIOBIT, AVORGBIO report 519
AVCAMPRO process 264
AVCAMPRO report 520
AVDESDNR report 523
AVGCINIT report 524
AVPACCTL process 466
AVPCAE report 524
AVPGPLOA process 347
  data fields 497
AVPOST process 388
AVPOST2 job 464
AVROLE report 526

B

Batch Programs page 459, 460
Batch Publish page 465, 466
Batch Publish process (EOP_PUBLISHM) 466
Batch Publish Rules page 459, 460
beneficiaries
  gift annuity 219
  pooled income 222
  trust 216
Benefits History page 302
Bequest Detail 2 page 209, 211, 224
Bequest Detail page 209, 224
Bequest Information page 209, 212
bequests
  codicils 211
  tracking 209
Bio Bit Setup page 7, 9
Bio Bit/Brief report 9
bio bit/briefs
  creating 183
  setting up 9
Bio Brief Setup page 7, 9
biographic narrative 179
biographic profile 145
Biographic Profile page 178, 183
Biographic Profile report 517, 519
Biographical Details page 125
Budget Detail page 243, 244
Budget page 243, 244
budget periods 89
Budget Table component (AV_BUDGET_TABLE) 57
Budget Table page 57
budgets
  creating 242
  defining categories 57
Business Unit CR component (AV_BUS_UNIT) 105
Business Unit CR page 106

C

CAE Gift Income report 524
CAE report 435, 517
CAE Report page 435
CAE Report process (AVPCAE) 435
Campaign Donor Phase Table component 60
Campaign Donor Phase Table page 61
Campaign page 229
Campaign Progress report 517, 520
Campaign Progress Report page 264
Campaign Summary page 266
campaigns
  creating actions 245
  defining web 115
  definition 47, 48
    See Also initiatives
  generating progress report 264
  management prerequisites 257
  managing 257
  setting initiative goals 259
  setting up 60
  setting up anticipated gift table 62

setting up reporting rules 64
setup prerequisites 45
understanding management 257
viewing initiative summary 266
viewing prospect list 263
viewing top donors 265
CASE, *See* Council for the Advancement and Support of Education
checks
entering details 339
entering information 289
class year
preferred 134
reviewing 22
clearance
prospect 189
viewing 200
Clearance page 185, 187, 189, 200
clubs, *See* giving clubs
codicils 211
comments, submitting xxxii
commitment profile 146
Commitment Register Filter page 439, 448
Commitment Register page 439, 449
Commitment Summary Details page 438, 447
Commitment Summary page 438, 446, 481
commitments
defining adjustment reasons 88
defining designation funds 83
defining designation types 81
defining matching gift types for designations 82
defining recognition types 87
defining tender types 79
entering 325
monitoring self-service 481
processing 377
setting up management 77
setup prerequisites 77
common elements xxxiii
common terms
gifts and pledges 326
managing membership 269
volunteer efforts 67
communications
defining methods 56
managing joint 419
Cond Pledge Designations page 359, 360
Cond Pledge Entry page 358, 359
Cond Pledge Recognition page 359, 362
conditional pledges
assigning designations 360
assigning recognition 362
converting to pledge 364
entering 358
entering details 359
understanding 358
Constituent Accumulators page 386, 388
constituent data
managing 121
prerequisites 25
setting up 25
constituent type
reviewing 22
Constituent Type page 128
Constituent Type Summary page 128
constituent types
adding to graduates 129
assigning 128
defining 26
maintaining 127
required values 26
understanding 26, 127
Constituent Types component (AV_CTYP_CD_TBL) 26
constituents
adjusting pledge payment schedule 369
establishing relationships 155
linking spouses 19
processing accumulators 385
updating organizations 345
updating people 344
using worksets 19
viewing audience history 150
contact information xxxii
Contact Report Detail page 189, 205
Contact Report page 186, 197
Contact Report Summary page 189, 204
contact reports
determining requirements 6
viewing 204
writing 197
contact types 33
Contributor Rel Installation component (AV_INSTALLATION) 3
Council for Aid to Education 435
See Also CAE report

Council for the Advancement and Support of Education
reporting 435
setting up reporting rules 64
CR Installation page 3, 459, 460
CR Merchants page 106, 107
CR Search page 122, 123
CR Search Result page 122, 124
Credit Card Type component (AV_CR_CARD_TYPE) 105
Credit Card Type page 106
credit cards
accessing payment pages 378
adjusting gift and membership payments 356
adjusting self-service payments 489
authorizing and settling 396
authorizing and settling denied transactions 399
authorizing transactions 394
connecting with third-party processor 107
defining payment methods 106
defining types 106
entering information 289
investigating self-service transactions 490
managing denied transactions 397
managing self-service transactions 471
processing denied self-service transactions 487
processing self-service 483
processing transactions 389
reviewing transaction activity 400
reviewing transactions 401
selecting denied transactions for processing 398
selecting transactions for processing 393
selecting transactions for review 400
self-service prerequisites 484
setting up processing 105
setting up third-party processor connection 106
settling transactions 396
understanding denied transactions 397
understanding processing 377
understanding self-service transaction types 484
understanding transaction processing 389
Criteria and Defaults page 255
cross-references xxxi
currency
matching gifts in foreign currency 421
setting defaults 11
Customer Connection website xxviii
CyberSource 106, 484

D

data, setting up constituents 25
Define Constituent Types page 27
Define Staff page 14
Define Volunteers page 14
degrees
adding external 132
adding internal legacy 135
maintaining information 131
Department Goals page 259, 262
Designation Adjust page 294, 296
Designation Detail page 350
Designation Donor List page 452
Designation Donor report 517, 523
Designation Funds 2 page 83, 85
Designation Funds component (AV_DESIGNATIONS) 83
Designation Funds page 83
Designation Types component (AV_INST_TYP) 81
Designation Types page 81
designations
adjusting for pledges 375
adjusting in gifts 353
assigning conditional pledges 360
defining campaign linked designations 118
defining funds 83
defining types 81
defining web 113
entering for gifts 335
entering for pledges 364
reports 452
viewing details 372
Designations page 285, 291
Display In Other Currency page 177
documentation
printed xxviii
related xxviii
updates xxviii

Donations – Campaigns page 475, 478, 479
Donations – Choose Organization page 475
Donations – Ways to Give page 479
Donor Appreciation Detail page 187, 199
Donor Appreciation Items page 37, 42
Donor Appreciation page 186, 198
Donor Appreciation Summary page 187, 199
Donor Phase Table page 61
donors
adding and updating records 149
analyzing history 437
creating pyramid 62
defining appreciation items 42
defining phases 61
viewing top summaries 266
dues, understanding 283

E

electronic addresses, *See* addresses, entering electronic
Electronic Addresses page 126
email addresses, *See* addresses, entering electronic
Email/URL page 136
emails, sending 22
employee list 140
Employee List page 140
Employment History Detail page 136
EP Denied Transactions – Filter Options page 398, 488
EP Denied Transactions – Transaction List page 398, 399, 488, 489
EP Transaction Log Inquiry – Filter Options page 400
EP Transaction Log Inquiry – Filter Options page 491, 493
EP Transaction Log Inquiry – Transaction List page 400, 401
EP Transaction Log Inquiry – Transaction List page 491, 494
EP Transaction Processing – Filter Options page 393, 396, 485
EP Transaction Processing – Transaction List page 393, 394, 485, 486
Event Goals page 317
event initiatives 74, 315
See Also events; initiatives
creating actions 245
definition 47, 48
See Also initiatives
management prerequisites 315
managing 315
setting intermediate goals 317
setting up 74
setup prerequisites 45
understanding management 315
Event page 229
event types, setting up 74
events
assigning meeting details 318
creating 318
creating templates 319
reviewing 319
tracking attendance 319
expenses, tracking 242
Ext Org Matching Gift page 423, 426
External Degrees page 132

F

filters
actions 201
commitment registers 448
involvement 154
resources 169
rosters 155
sessions 407
transactions 449
financials
identifying software version 6, 460
interfacing with 8.4/8.8 457
setting defaults 8
Financials 8.4/8.8 interface
illustrating the messaging process 457
messaging 457
monitoring messages 467
publishing accounting lines automatically 463
publishing accounting lines manually 465
setting up 459
setting up synchronization 461
setup best practices 468
synchronizing 462
understanding 457
viewing accounting lines 467
Fiscal Year Details page 481
Full Data Publish page 459, 462

Full Table Publish Rules page 459, 461
Fund Information page 475, 477, 479
fundamentals xxxv
funds, *See* pooled income funds

G

general functions 19
general ledger 91
See Also GL Interface
getting started 1
Gift Adjust page 353
gift and pledge supervisor, *See* supervisor
gift annuities 217
Gift Annuity Account Info page 225
Gift Annuity Beneficiaries page 218, 219, 225
Gift Annuity Detail page 225
Gift Annuity Details page 218
Gift Annuity Information page 218, 219
Gift Detail page 350, 351
Gift Entry page 334, 335
Gift Income report 524
Gift Summary page 350, 351
gift table
example 63
setting up 62
Gift Table page 61, 62
gift type, changing 355
Gift Types component (AV_GFT_TYPE_TBL) 78
Gift Types page 78
GIFTINC process 435
GIFTINCII process 435
GIFTINCIV process 435
gifts
adjusting 352
adjusting credit card payments 356
adjusting self-service payments 489
See Also self-service
applying matches 342
authorizing and settling credit card transactions 396
authorizing and settling denied credit card transactions 399
authorizing credit card transactions 394
defining donor appreciation items 42
defining types 78
editing or deleting 332
entering 335
entering check information 289, 339
See Also online gifts
entering commitments 325
entering credit card information 289, 339
entering payments 333
entering tribute details 341
handling matching 420
identifying matching gifts 342
investigating self-service transactions 490
See Also giving history
loading mass transactions 347
managing sessions 327
See Also sessions
matching and foreign currency 421
reviewing credit card transactions 401
selecting credit card transactions for processing 393
selecting credit card transactions for review 400
selecting denied credit card transactions 398
settling credit card transactions 396
tracking annuities 217
transferring sessions 409
understanding adjustment process 352
understanding matching 420
understanding payments 333
understanding sessions 327
understanding the process 325
updating constituent information 344
updating organization information 345
viewing details 351
viewing expected matches 426
viewing matches (organizations) 427
viewing matches (people) 427
viewing organization matching rules 424
viewing outstanding matches 426
viewing session transactions 349
viewing summary 351
viewing supervisor session summary 352
Giving Club Detail page 429
Giving Club Initialization Report 524
Giving Club Level Detail page 429
Giving Club Levels page 103, 104, 429
Giving Club Membership page 428, 429
Giving Club Membership Summary page 429, 434

Giving Club Progress page 429, 433, 482
Giving Club Rules page 103
Giving Club Summary page 429, 434
giving clubs
defining 102
defining levels 104
managing 428
manually generating membership 429
processing membership automatically 430
tracking progress 433
understanding 428
viewing summary 434
giving history
analyzing 437
comparing profiles 451
viewing commitment register 448
viewing commitment summary 446
viewing commitment summary details 447
viewing donor profile 440
viewing organization profile 443
viewing transaction register 449
Giving Profile Org – Giving Profile page 438
Giving Profile page 438, 440, 443
Giving Vehicles component (AV_GIVE_VEHICLE) 109
Giving Vehicles page 110, 119
GL interface
interfacing with Financials 8.4/8.8 457
running file extract 388
understanding 383
viewing accounting lines 402
GL Interface File Extract page 386, 388
GL Interface page 91, 386, 464, 465
glossary 529
Goal Type Table component (AV_GOAL_TYPE_TABLE) 55
Goal Types page 55
goals
defining types 55
developing anticipated gift table 62
viewing related 249
GPS (gift and pledge supervisor), *See* supervisor
Graduates to Alumni page 129
Graduates to Alumni report 517, 519

H

history
memberships 300
volunteer 312

I

IDs, tracking external system 127
illustrations
acknowledgement process 411
credit card adjustment process 356
financial messaging process 457
mass load gift and pledge 347
online giving life cycle 472
online pledge life cycle 472
implementation 2
Information page 225
Initial Setup page 90
Initiative Action page 246, 247
Initiative Action Summary page 249
Initiative Audience Build page 233, 235
Initiative Audience Merge page 233, 236
Initiative Detail page 188, 266, 267
Initiative Goals page 259, 260, 281
initiative mass change process 252
initiative type required values 49
Initiative Type Table component (AV_INTV_TYPE_TABLE) 49
Initiative Types page 49
initiatives
assigning related 236
assigning resources 237, 238
building audience 235
creating 47, 229
creating actions 245
defining 228
defining action information 56
defining action results 41
defining action status codes 41
defining audience 50, 232, 233
defining budget categories 57
defining communication methods 56
defining contact types 40
defining goal types 55
defining public relations plan 240
defining types 49
linking related 236
management prerequisites 227
managing 227
managing campaigns 257

managing events 315
managing membership 270
managing other 321
managing volunteers 305
preparing for letters 316
setting up 45
setting up appeals 58
setting up attribute types 50
setup prerequisites 45
types 47
understanding management 227
understanding mass change template 252
understanding setup 45
using mass change 251
viewing action summaries 248
viewing related goals 249
installation
setting defaults 3
setting institution defaults 7
institution
setting up defaults 7
Institution Defaults component (AV_INSTALL_INST) 7
Institution Installation 2 page 7, 9
Institution Installation page 7
institutional bequests 212
integration 1
Internal Degrees page 132
Internal Legacy Degrees page 132, 135
involvement
adding records 153
categories required values 28
creating roster 155
defining categories 28
defining codes 30
defining giving vehicles 119
defining settings 111
defining types 29
maintaining information 151
understanding 151
understanding codes 30
viewing records 154
Involvement
defining campaign linked appeals 118
defining campaign linked designations 118
defining web appeals 114
defining web campaigns 115
defining web designations 113
giving online 473
managing credit card transactions 471
setting up online giving 109
setting up online pledges 109
understanding 471
Involvement Categories component (AV_INVLV_C_TBL) 28
Involvement Categories page 28
Involvement Codes component (AV_INVLV_CD_TBL) 30
Involvement Codes page 31
Involvement component (AV_INST_WEB_INV) 109
Involvement Detail page 152
Involvement Filter page 152, 154
Involvement page 151, 153
Involvement Setup – Campaign Linked Appeals page 110, 118
Involvement Setup – Campaign Linked Designations page 110, 118
Involvement Setup page 110, 111, 478
Involvement Summary page 152
Involvement Types component (AV_INVLV_T_TBL) 29
Involvement Types page 29
item types, setting up 89

J

Join Worksets page 20
joint acknowledgements 412
joint communications 419
joint letter generator 412
journal generator templates 89
journal sources 89

L

Leadership Types component (AV_LDR_TYPE_TBL) 67
Leadership Types page 68, 70
Letter Generator process (CCLTRGEN) 411
letters
managing acknowledgements 411
preparing 93
preparing for initiatives 316
processing acknowledgements 414
using mass change 251
Linked Actions page 173, 175
linked addresses 126

lockbox
loading gifts and pledges 347
See Also Mass Load Gift/Pledge process (AVPGPLOA)

M

Mail In Donation Form page 475, 478, 479
Maintain Sessions page 328
Make a Donation – Confirm and Submit page 475, 477, 479
Make a Donation – Gift Information page 475, 476
Make a Donation – Payment Information page 475, 477, 479
Make a Donation – Pledge Information page 479
Make a Donation – Welcome page 475, 476, 479
Manage Worksets page 20
Mass Action Completion page 185
Mass Actions 1 page 185, 190
Mass Actions 2 page 185, 192
mass actions, completing 192
Mass Assign Staff page 162, 165
Mass Assign Units page 163, 165
Mass Assign Volunteers page 163, 165
mass change
understanding 251
understanding definitions 252
understanding membership template 253
using 251
mass gifts and pledges, loading 347
Mass Load Gift/Pledge page 347
Mass Load Gift/Pledge process (AVPGPLOA) 347
data fields 497
warning about pledges 347
MASSCHNG process 256
Matching Gift Detail page 350
Matching Gift Types component (AV_MTCH_GFT_TYP) 82
Matching Gift Types page 82
matching gifts
applying 342
changing gift type 355
defining organization matching rules 97
defining types for designations 82
handling 420
identifying potential 342
matching and foreign currency 421
understanding 420
viewing expected matches 426
viewing for organization 427
viewing for people 427
viewing organization matching rules 424
viewing organization restrictions 425
viewing outstanding 426
Matching Gifts page 334, 342, 353
Member Adjust page 294, 295
Member Adjust Summary page 294
Member Criteria page 272, 274
Member Dues page 272, 275
Member Objectives page 272, 274
Member Organization page 272
member organizations
assigning resources 277
building membership list 279
creating 271
defining 272
defining dues 275
defining objectives 274
setting criteria 274
understanding 271
Member Resources page 272, 277
member supervisor, *See* supervisor
Membership Audience Build page 279
Membership Audience Merge page 279, 280
Membership Category component (AV_MBR_CAT) 65
Membership Category page 66
Membership Detail – Designation page 301
Membership Detail page 301
membership entry
adjusting designations 296
adjusting dues payments 293
assigning designations 291
entering dues 283
entering dues payment detail 285
processing credit card transactions 293
selecting transactions to adjust 294
understanding dues payments 293
understanding processing 283
See Also memberships
Membership Entry page 285

Membership History page 482
Membership History Prsn page 301
membership history, self-service 482
membership initiatives
defining goals 280
definition 47, 48
See Also initiatives
setting annual goals 282
setting intermediate goals 281
setting up 65
setup prerequisites 45
Membership page 229
Membership Progress page 299
Membership Summary page 302
Membership Type component (AV_MBR_TYP) 65
Membership Type page 66
memberships 298
See Also membership entry
adjusting credit card payments 356
authorizing and settling credit card transactions 396
authorizing and settling denied credit card transactions 399
authorizing credit card transactions 394
canceling 295
creating actions 245
defining categories 66
defining types 66
giving clubs 429, 430
managing 269
preparing for letters 298
reviewing credit card transactions 401
selecting credit card transactions for processing 393
selecting credit card transactions for review 400
selecting denied credit card transactions 398
setting defaults 9
settling credit card transactions 396
transferring sessions 409
understanding 269
understanding dues 283
understanding mass change template 253
using mass change 251
viewing benefit history 301
viewing history 300
viewing progress 299
viewing summary 302
Merchant Table component (AV_MERCHANT_TBL) 105
message channels 457
messaging, illustrating the process 457
Method Table component (AV_METHOD_TABLE) 56
Methods page 56
MG, *See* matching gifts
MMA Partners xxviii
MS (member supervisor), *See* supervisor

N

names, managing 127
Narrative page 177, 179
notes xxxi
notifications, sending 22

O

online gifts
balancing, queuing, posting 483
choosing campaign 478
choosing organization 475
choosing way to give 476
confirming and submitting 477
defining giving vehicles 119
donating to campaigns 478
entering checks and credit cards 339
entering gift information 476
entering payment information 477
giving by mail 478
illustrating the life cycle 472
See Also gifts
prerequisites 474
setting up 109
starting the process 476
understanding 473
viewing fund information 477
viewing payment results 477
online pledges
choosing way to give 480
confirming and submitting 481
creating 480
entering information 480
entering payment information 480
illustrating the life cycle 472
making a pledge 478
pledging to campaign 480
setting up 109

See Also pledges
Open Pledge Register page 371, 372
Org Reciprocal Relationships component (AV_ORG_RELATE_TBL) 32
Org Relationship Summary page 157
Org to Person Relationships page 157
Org/Person Relationships page 159
Organization Financial Info page 137
Organization Locations page 136
Organization Profile page 142, 148
organizations
adding 136
defining matching gift rules 97, 139
defining person relationships 31
defining reciprocal relationships 32
entering contact data 137
entering department data 137
entering location data 136
establishing org-to-org relationships 157
establishing org-to-person relationships 159
establishing person-to-org relationships 158
maintaining financial information 137
reviewing data 139
setting up contact types 33
updating constituent information 345
viewing employee list 140
viewing matching gift restrictions 425
viewing matching gift rules 139, 424
viewing profile 148
Other Initiative Goals page 322
other initiatives 49
See Also initiatives
creating actions 245
management prerequisites 321
managing 321
preparing letters 322
setting intermediate goals 322
setup prerequisites 45
understanding management 321
Other Initiatives page 229
Other Initiatives/Others Assigned page 249
Outstanding Matching Gifts page 423, 426

P

participation profile 147
Payment Result page 475, 477, 479
Payment Schedule Adjust page 374
people
adding to the system 125
viewing profile 142
PeopleBooks
ordering xxviii
PeopleCode, typographical conventions xxx
PeopleSoft application fundamentals xxvii
Person Matching Gifts page 423, 427
Person Profile page 142
Person to Org Relationships page 156
Person/Org Relationships component (AV_PE_RELATION_TBL) 31
Person/Org Relationships page 32, 158
Personal Asset Detail page 177
Personal Asset Summary page 177, 180
Personal Assets page 177, 179
Philanthropic Interests page 178, 182
phone data
entering for organizations 136
managing for people 125
Phone Detail page 136
Phones page 126
photos 129
planned giving profile
viewing 225
working with 223
Planned Giving Profile page 224, 225
planned giving prospects
managing 207
tracking bequests 209
tracking gift annuities 217
tracking pooled income funds 220
tracking trusts 212
viewing profiles 223
plans, *See* prospects
Pledge Adjust page 374, 375
Pledge Detail page 371, 372
Pledge Entry page 364
Pledge Schedule Aging report 517, 519
Pledge Schedule page 334, 343, 364, 367, 369, 371, 373
pledge schedule, adjusting 369
Pledge Summary page 371
pledges 472
See Also giving history; online pledges
adjusting 373, 375

adjusting payment schedule 369
allowing feedable 5
determining payment schedule 367
distributing overpayments 8
distributing underpayments 8
editing 371
editing or deleting 332
entering 363
entering commitments 325
entering payment schedule 359
See Also conditional pledges
entering payments 333
entering transactions 364
entering tribute details 341
investigating self-service transactions 490
loading mass transactions 347
managing sessions 327
See Also sessions
receiving scheduled pledge 343
setting default schedules 5
setting payment override 5
transferring sessions 409
understanding adjustment 374
understanding entry 363
understanding payments 333
understanding sessions 327
understanding the process 325
updating constituent information 344
updating organization information 345
viewing 370
viewing details 372
viewing open register 372
viewing payment schedule 373
viewing register 372
viewing summary 371
viewing supervisor summary 372
Pooled Income Beneficiaries page 221, 222
Pooled Income Details page 221
Pooled Income Fund Beneficiaries page 225
Pooled Income Fund Detail page 225
pooled income funds 220
Pooled Income Information page 221, 223
PR plan, *See* public relations plan
PR Plan page 240
Preferred Class Year page 132, 134
prerequisites xxvii
Primary Location page 142
printed documentation xxviii
Process Acknowledgement page 414
Process Giving Clubs page 428, 430
Profile Compare Columns page 440
Profile Compare page 440, 451
profiles
viewing 140
viewing organizational 148
viewing personal 142
Prospect Action page 185, 193
Prospect Assignments page 165
Prospect Detail page 264
Prospect List page 264
Prospect Strategy Detail page 174, 176
Prospect Strategy page 173, 174
prospects
clearing 189
creating strategies 172
defining action contact types 40
See Also actions
defining action results 41
defining action status codes 41
defining rating categories 38
defining rating indicators 38
defining rating types 37
implementing plans 184
managing 161
managing planned giving 207
See Also clearance
setting up 35
setting up data 25
setting up identifiers 35
setup prerequisites 35
tracking information 176
understanding management 161
viewing 264
viewing clearances 200
public relations plan
defining 239
defining communication methods 56
publish-and-subscribe 457

Q

Queue Sessions page 380

R

Rating Categories component (AV_R_CAT_TBL) 35

Rating Categories page 36, 38
Rating Indicators component (AV_R_IND_TBL) 35
Rating Indicators page 36, 38
Rating Summary page 182
Rating Type page 36
Rating Types component (AV_R_TYPE_TBL) 35
Rating Types page 37
ratings
defining categories 38
defining indicators 38
defining types 37
maintaining 181
viewing 182
Ratings Detail page 178
Ratings page 178, 181
Ratings Summary page 178
receipts
managing acknowledgements 411
setting defaults 10
Reciprocal Relationship page 33
recognition
adjusting for pledges 375
adjusting in gifts 353
assigning to conditional pledges 362
defining types 87
entering for gifts 335
entering for pledges 364
setting default soft credit type 5
setting spouse splits 5
viewing details 372
Recognition Detail page 350
Recognition Types component (AV_RCG_TYPE_TBL) 87
Recognition Types page 87
records
searching for 122
setting last number 6
setting maximum retrieval value 9
understanding 122
using search/match 123
Regional page 125
register, viewing for pledges 372
related documentation xxviii
related goals 249
Related Goals page 250
Related Initiative page 236
related initiatives, viewing responsible staff 250
Related Rspn Prsn page 251
Relationship Detail page 157
Relationship Summary page 157
relationships
defining organization reciprocal 32
defining person-to-org 31
establishing 155
establishing org-to-org 157
establishing org-to-person 159
establishing person-to-org 158
establishing person-to-person 157
understanding 156
Relationships page 156, 157
religious preference 129
Reporting Rules page 61
reports
AV702 519
AV703 519
AVBIOBIT, AVORGBIO 519
AVCAMPRO 520
AVDESDNR 523
AVGCINIT 524
AVPCAE 524
AVROLE 526
Biographic Profile 517
CAE 517
Campaign Progress 517
contact report requirements 6
designation donor 452
Designation Donor List 517
Graduates to Alumni 130, 517
Pledge Schedule Aging 517
Role Assignments 517
setting up rules 64
required values
action results 41
action status codes 41
action types 39
constituent types 26
gift types 79
initiative types 49
involvement categories 28
membership types 66
recognition types 87
roles 15
Resource Assignment Detail page 188
Resource Assignments page 164, 170
Resource Filter page 164, 169
resources
adding 11

adding staff 14
adding volunteers 14
assigning for membership 277
creating assignments 161
creating individual assignments 166
creating mass assignments 165
defining roles 18
defining units 15
understanding 11
viewing assigned prospects 169
viewing staff members 18
viewing volunteers 18
Resources page 238
Restrictions page 98, 100, 423, 425
Role Assignments page 165, 170
Role Assignments report 170, 517, 526
roles
assigning options 4
assigning volunteers 306
defining 15, 18
pages affected by 11
required values 15
warning about installation settings 15
Roles component (AV_PRPS) 11
Roles page 14, 15
Roster Filter page 153, 155
Roster List page 153
Rqd Info/Contacts page 98, 102, 423
rules
defining batch publish 460
viewing organization matching gift 424
Rules page 98, 422, 424
Run Mass Change page 256

S

schedules
adjusting pledge payment 369
defining default payment 111
defining pledge payment 359
determining pledge payment 367
entering self-service pledge payments 480
receiving pledges 343
setting payment 5
setting up distribution 98
setting up pledge schedule 325
viewing matching gift distribution rules 424
viewing pledge payments 373
Search/Match page 122
Seasonal Addresses page 126
Self Service Gifts process (AV_INV_SESS) 483
Self Service Giving Inquiry – Filter Options page 491
Self Service Giving Inquiry – Self Service Gift Log Detail page 491, 493
Self Service Giving Inquiry – Self Service Giving Detail page 491, 493
Self Service Giving Inquiry – Self Service Giving List page 491, 492
Self Service Giving page 483
self-service
adjusting gift payments 489
filtering gifts 491
generating gift sessions 482
illustrating the online giving life cycle 472
illustrating the online pledge life cycle 472
investigating transactions 490
managing credit card transactions 471
online gifts 480
See Also online pledges
processing credit cards 483
processing denied credit card transactions 487
reviewing gift transactions 494
selecting denied transactions 488
selecting gifts for processing 485
selecting gifts for review 493
settling denied gift transactions 489
settling gifts 486
understanding 471
understanding transaction types 484
viewing commitment summary 481
viewing gift details 493
viewing gift information 492
viewing gift log details 493
viewing giving club progress 481
viewing membership history 482
viewing pledge details 493
viewing pledge information 492
Send BioDemo Update workflow 513
Send Contact Report workflow 514
Send Notification - Delivery Options page 23
Send Notification - Lookup Address page 23
Send Notification page 23

service indicators, creating 22
Session Defaults page 328, 330
Session Detail page 328, 332, 353
Session Filter page 407
Session Summary page 407, 408
sessions
balancing 328
balancing self-service 483
correcting errors 410
creating 328
filtering 407
generating self-service 482
loading mass transactions 347
managing 327
preparing for posting 89
processing and posting 381
queuing for posting 379
running GL Interface 386
scheduling pledge payments 367
selecting transactions to edit or delete 332
setting defaults 330
setting up item types 89
transferring 406, 409
understanding processing and posting 381
viewing details 332
viewing gifts 349
viewing summary 406, 408
viewing suspended 404
soft credit, setting default type 5
spouses
linking 19
managing joint communications 419
understanding joint acknowledgements 412
staff
understanding 11
See Also resources
viewing 18
Staff Assignment page 163, 166
Staff component (AV_STAFF) 11
Staff Roles component (AV_STAFF_PRPS) 11
Staff Roles page 14, 18
Staff To Do List page 205
strategies
creating 174
viewing details 176
viewing linked actions 175
viewing summary 176
Strategy Summary page 173, 176
Sub-Group Assignments page 307, 308
Sub-Groups page 68, 73
suggestions, submitting xxxii
supervisor
correcting session errors 410
transferring sessions 409
viewing gift sessions 352
viewing pledge summary 372
viewing pledges 370
Supervisor Gift Summ page 350, 352
Supervisor Membership Summary page 302
Supervisor Pledge Summary page 371, 372
Suspended Sessions page 404
system IDs, tracking external 127
system setup 3

T

Tender Type Detail – Credit Card Entry page 285, 334
Tender Type Detail page 289, 334, 339
Tender Types component (AV_GFT_TNDR_TBL) 79
Tender Types page 80
tender types, defining 79
terms 529
third-party credit card processor 106
To Do List page 189
to do lists
setting defaults 11
viewing 205
Top Donors page 266
Transaction Filter page 439, 449
Transaction Register page 438, 440, 450
transactions, viewing accounting lines 402
Transfer page 407, 409, 415, 417
tribute
adjusting for pledges 375
adjusting in gifts 353
entering details 341
entering for gifts 335
entering for pledges 364
Tribute detail page 351
Tribute page 334, 341
Trust Account Information page 213, 215, 224

Trust Beneficiaries page 224
Trust Beneficiary page 213, 216
Trust Categories component (AV_TRUST_C_TBL) 35
Trust Categories page 37
Trust Detail page 213, 224
Trust Gift Information page 213, 214, 224
Trust Information page 213, 216
Trust Terms component (AV_TRUST_R_TBL) 35
Trust Terms page 37
Trust Types component (AV_TRUST_T_TBL) 35
Trust Types page 37
trusts 212
typographical conventions xxx

U

Unit Assignment page 164, 168
Unit Goals page 259, 262
Unit Roles component (AV_UNIT_PRPS) 11
Unit Roles page 14, 18
Unit To Do List page 205
units 11
See Also resources
Units component (AV_UNIT_TBL) 11
Units page 14, 15
Update Information page 335, 344, 345
Update Linked Addresses page 126

V

View Staff page 14, 18
View Volunteers page 14, 18
visual cues xxxi
Volunteer Assignment Detail page 312
Volunteer Assignment page 164, 167
Volunteer Assignments 1 page 310
Volunteer Assignments 2 page 310, 311
volunteer efforts
common terms 67
definition 47
See Also initiatives
setting goals 71
setting up 67
Volunteer Goals page 68, 71
Volunteer Group Assignments page 307
Volunteer History page 312
volunteer initiatives
creating actions 245
definition 48
setup prerequisites 45
Volunteer Roles component (AV_VOL_PRPS) 11
Volunteer Roles page 14, 18
Volunteer Structure page 68, 72
Volunteer To Do List page 205
volunteers 11
See Also resources
assigning roles 306
assigning to roles 307
assigning to tasks 309
creating biographic reports 312
creating subgroup assignments 308
defining areas of responsibility 69
defining assignment types 69
defining contact types 40
defining leadership types 70
evaluating 311
management prerequisites 305
managing 305
structuring leadership group 72
understanding 11
understanding management 305
viewing 18
viewing audience history 313
viewing history 312
Volunteers component (AV_VOLUNTEERS) 11
Volunteers page 229

W

warnings xxxi
budgets 244
defining attribute types 51
loading gifts and pledges 347
mass load gift and pledge 347
processing giving clubs 430
roles 15
Ways to Give page 475, 476
Web Appeals page 110, 114
Web Campaign Narrative page 110, 117
Web Campaigns page 110, 115
Web Designations page 110, 113
Work Experience page 136
work experience, maintaining 135
workflows
delivered 513
Send BioDemo Update 513

Send Contact Report 514
worksets
Acknowledge Suspense page 416
Acknowledgement List page 418
building from system pages 21
comparing profiles 451
creating 20
Employee List page 140
Giving Club Membership Summary page 434
joining 20
Prospect List page 264
Resource Assignments page 170
Roster List page 155
Top Donors page 266
understanding 19
working with 19