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PeopleSoft

PeopleSoft Campus Solutions 9.2: Contributor Relations

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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help Website.

Locally Installed Help

If you're setting up an on-premise PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. See Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	*Description*
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.
. . . (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.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation

does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific 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 region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- 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 the PeopleSoft Online Help:

- USF (U.S. Federal)

- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help

- Managing Hosted online help

- Managing locally installed PeopleSoft Online Help

PeopleSoft CS Related Links

Hosted Online Help Home

PeopleSoft Information Portal

My Oracle Support

Contact Us

Send your suggestions to psoft-infodev_us@oracle.com. Please include the applications update image or PeopleTools release that you're using.

Follow Us

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Chapter 1

Getting Started with Contributor Relations

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 fund-raising 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 content reviews the concepts behind Contributor Relations business processes and presents procedures for setting up and using this part of the PeopleSoft Campus Solutions system.

Important! Oracle 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, topic, product, or product line.

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 this collection of topics.

Contributor Relations Integrations

The following graphic illustrates the other PeopleSoft applications that Contributor Relations integrates with and the flow of data between those applications:

Image: Contributor Relations integrations between other PeopleSoft applications

Contributor Relations integrates with PeopleSoft Student Records, Student Financials, Campus Community, and Financials, as well as with third-party payment processing applications, as shown in the following diagram:
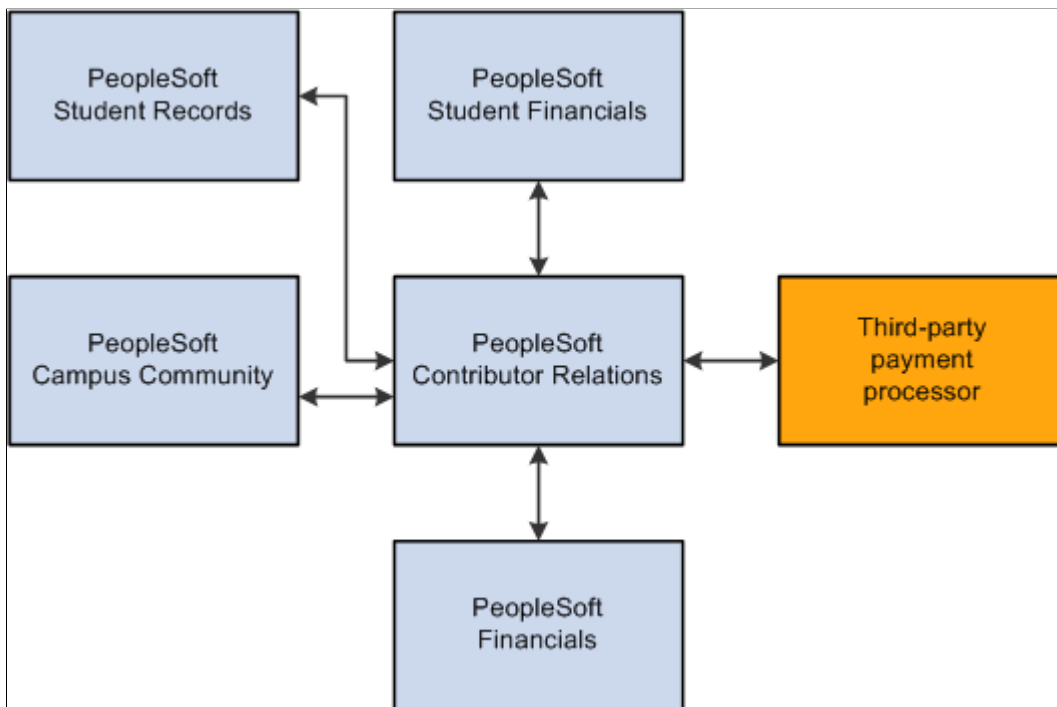
We discuss integration considerations in the implementation topics. Supplemental information about third-party application integrations is located on the My Oracle Support website.

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 documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all Oracle PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines.

PeopleTools: Component Interfaces

PeopleTools: Setup Manager

Common Elements Used in Contributor Relations

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 appears. 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 the current date, but can be overridden.
Person/Org	Select either *Person* or *Organization* to determine the constituent 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)	The format of this field 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 appear 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.

Additional Information for Getting Started with Contributor Relations

Additional, essential information describing the setup and design of your system appears in two companion volumes of documentation: *Campus Solutions Application Fundamentals* documentation and *Campus Community Fundamentals* documentation.

See Campus Solutions Application Fundamentals.

See Campus Community Fundamentals.

For information about deferred processing, see "Additional Information for Getting Started with Campus Solutions" (PeopleSoft Campus Solutions 9.2: Application Fundamentals).

Chapter 2

Setting Up Your Contributor Relations Framework

Completing a PeopleSoft Contributor Relations Installation

To set up Contributor Relations installation defaults for classic and fluid interfaces, use the Contributor Rel Installation component (AV_INSTALLATION).

This section discusses how to set up Contributor Relations installation defaults.

Page Used to Complete a PeopleSoft Contributor Relations Installation

Page Name	Definition Name	Navigation	Usage
CR Installation	AV_INSTALLATION	Set Up SACR > Install > Contributor Rel Installation	Define system-wide business rules for many classic or fluid functional areas within the Contributor Relations system. In addition, specify the most recently used numbers for strategies, assets, ratings, actions, gifts, sessions, and so forth to eliminate problems with duplicate data after the conversion is complete.

Setting Up Contributor Relations Installation Defaults

Access the CR Installation page (Set Up SACR > Install > Contributor Rel Installation).

Image: CR Installation page

This example illustrates the fields and controls on the CR Installation page. You can find definitions for the fields and controls later on this 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, and then select that role for Darla Perkins on the Staff Roles page. Then, if this is her only defined role, only the *Prospect Manager* role appears as an available option when Darla Perkins is selected.
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 to any defined role. This option enables you to assign a unit as a Prospect Manager; no restrictions prevent you from doing so. See <u>Defining Roles</u>.

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 they can be overwritten.

Donor Record	Select a credit type and the percent of the gift to allocate to that credit type as the 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 the default.
Spouse Record	Select a credit type and the percent of the gift to allocate to that credit type as the 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 the default.

Note: The two rows of donor recognition defaults and two rows of spouse recognition defaults enable you to 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 percent.

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

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

Default Soft Credit Type	Select the soft credit type that will 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 appear in this prompt dialog box. *Hard Credit* is a delivered credit type. All other credit types are considered soft credit.
Payment Schedule	Select the payment schedule that will appear by 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.
Feed Gift to GL and **Feed Pledge to GL**	Select these check boxes for the ability to send gifts and pledges to the financial system for recording as a receivable. This

<table>
<tr><td></td><td>process is not automatic. 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 gift or 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.</td></tr>
<tr><td>**Allow Pledge Payment Override**</td><td>Select this check box to allow data entry staff to change recognition or designation information for a pledge at the time of pledge payment.</td></tr>
</table>

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

Contact Reports

You 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.

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 Financials and by an external financial application. The value *8.4 or 8.8* triggers an integrated messaging interface.

Understanding the Interface

Name Display Type

Select a particular Name Display Type for the system to use to generate display names throughout the headers of Contributor Relations pages. Only current, active, effective-dated Name Display Types appear in this list. You can define the properties for a display name on the Name Display Type setup component.

Note: If you do nothing to implement this functionality, there is no impact on how the system displays names throughout Contributor Relations.

See Defining Name Display Settings.

Enable New Features

Enable CR Outreach Fluid	Select to indicate that fluid features for Contributor Relations self service has been adopted. By default, this check box is deselected.

This check box is for informational purposes only.

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 that follows 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, you should never reset them or decrease them. Resetting or decreasing these numbers could result in duplicate key errors. However, you can increase these numbers.

Enter these default values:

- The last number assigned to the most recent prospect strategy in the Strategy Number field.

- The last number assigned to the most recent personal asset in the Asset Number field.

- The last number assigned to the most recent prospect rating in the Rating Number field.

- The last number assigned to the most recent constituent action in the Action Number field.

- The last number assigned to the most recent initiative action in the Initiative Action Number field.

- The last number assigned to the most recent commitment in the Gift Number field.

- The last number assigned to the most recent session in the Session Number field.

- The last number assigned to the most recent organization relationship record in the Relation Number field.

- The last number assigned to the most recent planned gift in the Planned Giving Number field.

- The last number assigned to the most recent volunteer group in the Volunteer Group field.

- The last number assigned to the most recent volunteer structure in the Volunteer Structure Number field.

- The last number assigned to the most recent membership in a member organization in the Membership Number field.

- The last number assigned to the most recent membership dues payment in the Membership Payment Number field.

- The last number assigned to the most recent online gift or pledge in the Last Receipt Number field.

- The last number assigned to the most recent credit card transaction processed in the Last Reference Number field.

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 up institution default values.

- Set up additional default values for the institution.

Pages Used to Set Up Institution Defaults

Page Name	Definition Name	Navigation	Usage
Institution Installation	AV_INSTALL_INST	Set Up SACR > Product Related > Contributor Relations > Install Contributor Relations > Institution Defaults > Institution Installation	Set institution default values that are used throughout the system.
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 Up Institution Default Values

Access the Institution Installation page (Set Up SACR > Product Related > Contributor Relations > Install Contributor Relations > Institution Defaults > Institution Installation).

Image: Institution Installation page

This example illustrates the fields and controls on the Institution Installation page. You can find definitions for the fields and controls later on this 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 value appears by default 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 on the Membership Entry page.
Membership Days	Enter the 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, and you set the Membership Days field to 31 days. Therefore, any dues payments that are received for that

membership organization after May 1 are credited toward the next membership period.

Setting Up Additional Default Values for the Institution

Access the Institution Installation 2 page (Set Up SACR > Product Related > Contributor Relations > Install Contributor Relations > Institution Defaults > Institution Installation 2).

Image: Institution Installation 2 page

This example illustrates the fields and controls on the Institution Installation 2 page. You can find definitions for the fields and controls later on this 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 selected. The system never generates a receipt for recognition of soft credit only, even if this option is selected or the gift is joint with a hard credit donor.
Adjusted Gift and **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 before the planned date of an action that 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, you cannot make further changes after you select a value for this field and save this page.
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, you cannot make further changes after you select a value for this field and save this page.

Action Commitments

This group box enables you to determine how far back in time your institution wants the system to go when returning gifts and pledges for display on the Action Results page. The system displays all gifts with an age of [current date] minus [Gift Days value]. The same rule applies to Pledge Days. The default value for both fields is set to *60* but can be changed to include gifts or pledges beyond 60 days.

Defining Name Display Settings

To define how the system displays names throughout Contributor Relations pages, use these components: Name Display Type (SCC_NMD_TYP_TBL) and Name Display Type Parameters (SCC_NMD_TYP_PRM).

This section provides an overview of name display and discusses how to:

*   Define a name display type.

*   Configure name display rules.

Understanding Name Display

The Name Display framework provides a configurable solution that allows institutions to define how a display name appears throughout the Contributor Relations product. This functionality specifically focuses on how a display name appears at the top of the page (at Level 0), not elsewhere on the page. Note that this functionality only impacts pages accessed through the Contributor Relations menu; the style and formatting does not follow to a component accessed from a link within a component or which results in a transfer to a component not on the Contributor Relations menu.

Pages Used to Define Name Display Settings

Page Name	Definition Name	Navigation	Usage
Name Display Type	SCC_NMD_TYP_TBL	Set Up SACR > Product Related > Contributor Relations > CR Common Definitions > Name Display Type Setup	Set the various display properties for a display name.
Name Display Type Parameters	SCC_NMD_TYP_PRM	Click the Edit Parameters button on the Name Display Type page.	Further configure how the system displays names throughout Contributor Relations.

Defining a Name Display Type

Access the Name Display Type page (Set Up SACR > Product Related > Contributor Relations > CR Common Definitions > Name Display Type Setup).

Image: Name Display Type page

This example illustrates the fields and controls on the Name Display Type page. You can find definitions for the fields and controls later on this page.

There are four delivered Style choices: *PABOLDBLUETEXT, PABOLDTEXT, PSTEXT,* and *STRONG*; *PSTEXT* is the default value. The system always applies the style you select here to a display name, regardless of any additional parameters. After saving this page, click the Edit Parameters button to access the Name Display Type Parameters page, where you can further define how names will appear.

Configuring Name Display Rules

Access the Name Display Type Parameters page (Click the Edit Parameters button on the Name Display Type page).

Image: Name Display Type Parameters (1 of 2)

This example illustrates the fields and controls on the Name Display Type Parameters (1 of 2). You can find definitions for the fields and controls later on this page.

Image: Name Display Type Parameters (2 of 2)

This example illustrates the fields and controls on the Name Display Type Parameters (2 of 2). You can find definitions for the fields and controls later on this page.

Name Types

Name Type	Select a name type, which is defined on the Name Type Table page. You can assign multiple name types (such as Primary, Preferred, and Legal) to each Name Display Type. The value selected here determines which name type the system displays for a person's record on the Name Display subpage at Level 0 in a component.
Order	Rank the Name Type in the Name Type hierarchy for the Name Display Type. The system uses this hierarchy in the Display Name resolution process, and determines the particular name display options to use for a display name.
Default Name Field	Select from three delivered options: *Use Formal Name, Use Name,* or *Use Name Display.* If no Country Rules are specified, the Default Name Field value is used to derive the Display Name.

Country Rules

You can define multiple sets of country rules for each Name Type. For example, your institution might define English country rules for the primary name type and Belgian country rules for the preferred name type. If you specify country rules, then you must select an option in the Name Field group box.

Format Using	The system only displays Campus Solutions-supported countries in this list.
Test EmplID	Add person IDs to this grid, which allows you to select test IDs to see how a name actually appears on a page based on the rules entered. You can only add IDs whose names include parts associated with the country.

Name Field

Use the fields in this group box to override the Default Name Field option in the Name Types group box and customize names for a specific country format. You can define the name's appearance part by part, as you go; the appearance of each ID added to the Name Display Test group box refreshes on any field change you make.

There are four options in this group box: Use Name Display, Use Formal Name, Use Name, and Use Name Parts. If you select the Use Name Parts option, the Name Parts grid appears. The grid displays Name Fields specific to the country selected.

Part Type	Available options are: *Name Field, Space,* or *User Defined.*
	Name Field: contains values that are dependent on the selected country format such as First Name, Middle Name, Last Name.
	Space: allows you to add a single space between other part types. Spaces can only be specified from Part 2 onward.
	User Defined: allows you to define other characters (such as commas or periods), or a character string up to 35 characters long.
Name Field	The values that appear in this column are country-specific, based on your selection in the Format Using field.
Dependency	Enter a number to specify a dependent Part, so that parts are only displayed when their dependent parts contain a value. For example, if a prefix is listed but a person has no prefix associated with their name record, the system ignores the entire prefix (name part, punctuation, and spaces) and moves to the next part in the list.

Ignore Criteria

This group box is hidden by default; select the Ignore Rules check box to make it appear. Use the fields here to ignore any Name Field parts of a name. For example, you can make selections here to remove any special characters (such as * or !) used as placeholders for people with single names in your database.

Adding Resources

To add resources, use these components: Roles (AV_PRPS), Staff (AV_STAFF), Volunteers (AV_VOLUNTEERS), and Units (AV_UNIT_TBL).

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

• Define roles.

• Define staff and volunteers.

• Define units.

Understanding Resources

You can add staff members, volunteers, and business units to the system and you can 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 she or he can be added as a staff member or volunteer. Adding a person is required to enable access to functions throughout the Contributor Relations system. You should carefully decide on the roles at your institution and assign resources to the 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	*Page 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_DESIGNATION	Designation Funds
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

Page Name	*Page Title*
AV_MASS_PRSN_WS	* Mass Assign Staff (workset version)
AV_MASS_UNIT	* Mass Assign Units
AV_MASS_UNIT_WS	* Mass Assign Units (workset version)
AV_MASS_VOL	* Mass Assign Volunteers
AV_MASS_VOL_WS	* Mass Assign Volunteers (workset version)
AV_OUTR_ACTN_ASGN	* Outreach Constituent Action
AV_PINC_INFO	* Pooled Income Information
AV_RUNCTL_ROLE	* Role Assignments Report
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	*Definition Name*	*Navigation*	*Usage*
Roles	AV_PRPS_TBL	Set Up SACR > Product Related > Contributor Relations > CR Common Definitions > Resources > Roles	Set up the resource roles at your institution.

Page Name	Definition 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, and assign roles to them.
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 fund-raising and cultivation purposes, and assign roles to them.
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 for your institution.

Defining Roles

Access the Roles page (Set Up SACR > Product Related > Contributor Relations > CR Common Definitions > Resources > Roles).

Image: Roles page

This example illustrates the fields and controls on the Roles page. You can find definitions for the fields and controls later on this 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.

This table lists values that are required in the PURPOSE_CD field that resides in the AV_PRPS_TBL table:

Code	Value	Where Used	Purpose
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 session expected amounts and counts, reopen a balanced session, or transfer sessions among users on the Session Summary page.
GE	Gift Entry Operator	Session Management	Assigning the GE role to a user provides the ability to access the user's sessions in session management and on the Session Summary page. The user cannot view 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 membership session expected amounts and counts, reopen a balanced membership session, or transfer membership sessions among 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 is 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, and then select that role code for Darla Perkins on the Staff Roles page. You should select the appropriate Staff, Volunteer, or Unit check box 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 will already be set up.

Defining Staff and Volunteers

Access the Define Staff or the Define Volunteers page (Set Up SACR > Product Related > Contributor Relations > CR Common Definitions > Resources > Staff or Set Up SACR > Product Related > Contributor Relations > CR Common Definitions > Resources > Volunteers).

Image: Define Staff page

This example illustrates the fields and controls on the Define Staff page. You can find definitions for the fields and controls later on this page.

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

Staff Roles

Role   Select one or more roles to associate with the resource. The description of the role appears to the right of the code.

Important! The system uses individual staff and volunteer roles if you select the Defined installation mode for assignments on the CR Installation page.

Defining Units

Access the Units page (Set Up SACR > Product Related > Contributor Relations > CR Common Definitions > Resources > Units).

Image: Units page

This example illustrates the fields and controls on the Units page. You can find definitions for the fields and controls later on this page.

The units that you define here are used by this application only; they 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.

Unit Roles

Role	Select one or more roles to associate with the resource. The description of the role appears to the right of the code.

Important! The system uses individual unit roles if you select the Defined installation mode for assignments on the CR Installation page.

Chapter 3

General Functions Used Throughout the System

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 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.

- Manage workset members.

- Build worksets.

- 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	Definition Name	Navigation	Usage
Manage Worksets	AV_WORKSET	Contributor Relations > Constituent Information > Workset > Manage Worksets	Create or update worksets.
Workset Members	AV_WORKSET_MEMBERS	Contributor Relations > Constituent Information > Workset > Workset Members	Add constituents to or delete constituents from a workset.
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.
Build Worksets	AV_WORKSET_BUILD	Contributor Relations > Constituent Information > Workset > Build Worksets	Build worksets using population selection. To rebuild on a regular basis, use Process Scheduler.

Creating a Workset

Access the Manage Worksets page (Contributor Relations > Constituent Information > Workset > Manage Worksets).

Image: Manage Worksets page

This example illustrates the fields and controls on the Manage Worksets page. You can find definitions for the fields and controls later on this page.

Workset Code	10 character code for 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.
Owner	The person who owns the workset and is responsible for its upkeep.
Author	The UserID of the person who entered the workset members into the workset. If the UserID is different than the Owner, then both the author and owner have edit access to the workset.
Notes	Provides further information about the purpose of the workset.
Workset Status	Indicates whether the workset is *Active* or *Inactive*. Generally, worksets are active.
Workset Type	Indicates whether the workset is static (a fixed set of records) or dynamic (a "moving" set of records that needs to be updated on a schedule to include/exclude members based on the criteria).

Total Members	The number of records in the workset.

Workset Access

There are four ways to provide access to a workset:

Private	Only the owner or author can view and edit it.
Public	Everyone can view the workset. Only the owner or author can edit or delete it.
Security Role	Select the specific Campus Solutions Security Roles or UserIDs that have access to the workset.
Staff Role	Select the specific Contributor Relations Staff Roles that will have access to the workset.

Once you have selected who should have access to the workset by selecting Security Role or Staff Role, you must determine what access they will receive. There are five levels of access that can be assigned:

View Only	The user may only view and use the workset but may not add or delete any of its constituents.
Add/View Mbr (member)	The user may add constituents to the workset and use it, but may not delete any of its constituents.
Delete Mbr (member)	The user may be assigned Delete Mbr access only if Add/View Mbr access has also been assigned.
Build WS (workset)	The user has access to the Build Workset page and may build worksets to which they have security access.
Delete WS (workset)	The user may delete the workset. The owner and author always may delete a workset. This extended access should be assigned sparingly to a staff member who is responsible for maintaining worksets in general.

Workset Management Method

Select the method you want to use to build the workset. A Manual workset is built simply by adding constituent IDs on the Workset Member page. To build a workset using a query, a flat file, or Equation Engine, select Population Selection.

Method	*Description*
Manual	Build a manual workset simply by adding constituent IDs on the Workset Members page. When you select this option, the Workset Members tab appears, on which you can add members. See "Managing Workset Members"

Method	Description
Population Selection	Select this option to use flexible methods to create worksets. This group box appears when you select the Population Selection process. Population selection is a method for selecting the IDs to process for a specific transaction. The Population Selection group box is a standard group box that appears on pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes. If your institution uses a specific delivered selection tool (PS Query, Equation Engine equation, or external file) to identify IDs for a specific transaction, you must use it. --- *Warning!* Any query you select for workset criteria cannot contain prompts. Also, all queries and equations to be used with the Build Workset process must include the AV_WORKSET_BND record. --- See *Campus Community 9.2 Fundamentals,* "Using the Population Selection Process"

To use Equation Engine to build worksets, you must complete the following setup once before creating an equation:

1. Add the AV_WORKSET_BND and the AV_WORKSET_RSLT records to the Equation Data Tables component (Set Up SACR > Common Definitions > Equation Engine > Equation Data Tables).

2. Map the equation to a Context Map (Set Up SACR > System Administration > Utilities > Population Selection > Equation to Context Mapping).

3. Create the equation and set the appropriate equation security.

See *PeopleSoft Campus Solutions 9.2 Application Fundamentals PeopleBook,* "Setting Up Equation Engine," Completing Equation Engine Setup

When you save the page, the system prompts you to make sure that the Owner and Author are correct, as these cannot be changed once saved.

Managing Workset Members

Access the Workset Members page (Contributor Relations > Constituent Information > Workset > Workset Members).

Image: Workset Members page

This example illustrates the fields and controls on the Workset Members page. You can find definitions for the fields and controls later on this page.

This page allows the owner and author to add constituents to or delete constituents from a workset. All other editing access depends on the security access set for the workset. If the workset is *Public*, all users may view the workset members, but may not edit them. If a user has not been granted security access to delete members from the workset, the Row Delete button does not appear.

ID Type and **ID**	Select the ID Type and ID for each constituent to include in the workset.
Saved By and **Date and Time**	Displays the name of the person who added the constituent to the workset and the date/time they were added.

Building Worksets

Access the Build Workset page (Contributor Relations > Constituent Information > Workset > Build Worksets).

When you click the Run button, the system runs the AV_BLD_WRKST Application Engine Process that evaluates the population selection criteria set up on the Manage Worksets component and selects workset members according to the workset selection criteria.

Worksets to be Built

The system displays worksets here that are ready to be built. This grid only shows worksets to be built using the Population Selection process and for which the user has security to build the workset.

Worksets to be Updated

If you want to rebuild a workset, use these fields to select those to be updated. When you rebuild a dynamic workset, the process adds any additional constituents that meet the workset criteria and removes those who no longer meet the criteria. When you update a static workset, the process adds any additional constituents that meet the workset criteria and removes none.

Joining Worksets

Access the Join Worksets page (Contributor Relations > Constituent Information > Workset > Join Worksets).

Image: Join Worksets page

This example illustrates the fields and controls on the Join Worksets page. You can find definitions for the fields and controls later on this page.

Users may only join worksets for which they are the owner or author and which are private.

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 nonmatching 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 Campus Community application.

Related Links

"Setting Up Service Impacts" (PeopleSoft Campus Solutions 9.2: Campus Community)

"Setting Up Service Indicator Codes and Reasons" (PeopleSoft Campus Solutions 9.2: Campus Community)

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. Click the Class Year link to display 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	Definition 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.

Creating and Viewing Attachments

This section provides an overview of new attachment functionality in Contributor Relations and discusses how to create and view attachments throughout the system.

Understanding Attachments

File attachments provide the ability to upload, modify, view and delete files in several areas of the product. The following table provides a high-level overview of where file attachments can be used in Contributor Relations:

Area	Functionality
Persons and Organizations	A number of components can manage an overall set of file attachments for both people and organizations. Each attachment uploaded is assigned an attachment type. This type is defined by the user and is used for grouping and filtering attachments. The Person Profile and Organization Profile pages list the attachments created for the constituent where they can be subsequently downloaded and viewed on demand.
Gift Entry and Pledge Entry	Files can be attached to individual gift and pledges within a session. Attachments in posted gift and pledge sessions can be viewed and managed without the need to create an adjusted session.
Planned Giving	Files can be attached to individual bequests, trusts, gift annuities, and pooled income funds. The planned giving profile and prospect profile components list the attachments where they can be subsequently downloaded and viewed on demand.
Prospects	A common set of attachments can be managed for a prospect using the Prospect Attachments components. The attachments created can be viewed from the Prospect Profile page. Attachments can also be added to Strategies.
Designations	Attachments can be created and managed for each individual designation fund. Any attachments created can be viewed using the designation fund details components.
Action Entry	Attachments can be created and managed for each individual action assigned to people and organizations in Contributor Relations. The attachments created can be viewed using the Action Details secondary page.
Matching Gift	Attachments can be created and managed using the Matching Rules component. The attachments created can be viewed using the View Matching Rules component.
Initiatives	Attachments can be created and managed for each initiative (campaign, event, membership, volunteer, and other initiatives). The campaign attachments created can be viewed from the Campaign Summary component.

There are four categories of attachments that you can create and view:

- Constituent attachments.

- Transactional attachments.

- Planned giving attachments.

- Initiative attachments.

Related Links
Creating Constituent Attachments

Chapter 4

Setting Up Constituent Data

Prerequisites for Constituent Data

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?

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

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
13	Personal, Family Foundation
14	Fund-Raising Consortia
15	Association
16	Religious Organization
17	Government
18	Government Foundation

Code	Value
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	Definition 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 (Set Up SACR > Product Related > Contributor Relations > Constituent Information > Constituent Types).

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	Definition 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 (Set Up SACR > Product Related > Contributor Relations > Constituent Information > Involvement Categories).

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	Definition 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 (Set Up SACR > Product Related > Contributor Relations > Constituent Information > Involvement Types).

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

Setting Involvement Codes Values

Access the Involvement Codes page (Set Up SACR > Product Related > Contributor Relations > Constituent Information > Involvement Codes).

Image: Involvement Codes page

This example illustrates the fields and controls on the Involvement Codes page. You can find definitions for the fields and controls later on this page.

All involvement codes are required to be tied to at least one involvement type and one involvement category. Click the Add all Types or Add all Categories buttons to quickly associate commonly used codes between all types and categories as appropriate.

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.
Valid Involvement Categories	Select the involvement categories to which the involvement code applies.

Related Links

Defining Involvement Types
Defining Involvement Categories

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	Definition 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 (Set Up SACR > Product Related > Contributor Relations > Constituent Information > Person/Org Relationships).

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 record of the person or the organization, you 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	Definition 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 (Set Up SACR > Product Related > Contributor Relations > Constituent Information > Org Reciprocal Relationships).

Image: Reciprocal Relationship page

This example illustrates the fields and controls on the Reciprocal Relationship page. You can find definitions for the fields and controls later on this 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.

Related Links
"Defining Contact Types" (PeopleSoft Campus Solutions 9.2: Campus Community)

Setting Up Attachment Types

This section discusses how to define attachment types.

Page Used to Set Up Attachment Types

Page Name	Definition Name	Navigation	Usage
Attachment Types	AV_ATCH_TYPE	Set Up SACR > Product Related > Contributor Relations > CR Common Definitions > Attachment Types	Define attachment types, which are available to select when attaching files to person, organization, and prospect records on the respective Person- Attachments, Organization Attachments, or Workset Attachments components.

Defining Attachment Types

Access the Attachment Types page (Set Up SACR > Product Related > Contributor Relations > CR Common Definitions > Attachment Types).

Related Links

Creating and Viewing Attachments

Chapter 5

Setting Up Prospects

Prerequisites for Prospects

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.

- 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 origins.

- 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	*Definition 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 Origin	AV_R_ORIGIN_TBL	Set Up SACR > Product Related > Contributor Relations > Prospect Management > Rating Origin	Define where the rating indicator or category was originated.
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 the rating of a constituent.
Action Types	AV_ACTN_TYPE_TBL	Set Up SACR > Product Related > Contributor Relations > CR Common Definitions > Actions > 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 > Actions > 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 > Actions > 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 > Actions > Action Results	Define the valid results for actions.

Page Name	*Definition 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 (Set Up SACR > Product Related > Contributor Relations > Prospect Management > Asset Types).

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 (Set Up SACR > Product Related > Contributor Relations > Prospect Management > Rating Type).

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 Origins

Access the Rating Origin page (Set Up SACR > Product Related > Contributor Relations > Prospect Management > Rating Origin).

The Ratings Origin identifies the source of the rating indicator or category. Campus Solutions delivers one rating origin value: *Institution.* This value indicates that the category or indicator was initiated by

the institution using Contributor Relations. Additional rating origins can be created to identify rating indicators and categories originating from external sources that are being used to rate constituents.

Defining Rating Categories

Access the Rating Categories page (Set Up SACR > Product Related > Contributor Relations > Prospect Management > Rating Categories).

Image: Rating Categories page

This example illustrates the fields and controls on the Rating Categories page. You can find definitions for the fields and controls later on this 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*.

Valid Indicators	Valid indicators allow the appropriate values to appear for the category when entering a rating on the Ratings Indicator Page. Select the indicators that are applicable to the ratings category. For example, if the Ratings Category is *Survey Results,* only those ratings indicators pertinent to surveys would be valid indicators.
Create a New Indicator	Click to access the Rating Indicators page, where you can add a new rating indicator code.

Defining Rating Indicators

Access the Rating Indicators page (Set Up SACR > Product Related > Contributor Relations > Prospect Management > Rating Indicators).

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 the potential of a prospect 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.*

Valid Values	Select this check box to indicate that the indicator code requires certain values to be returned in the Value field on the Ratings page. If you select this check box, the system displays the Valid Values group box.
Valid Value and **Description**	Enter a brief description of the valid value for the indicator code. Valid Values allow the indicator to be refined to a more specific level than the indicator itself. For example, the rating indicator may be Self-employed and the valid values may be Owner, Consultant, Proprietor.
Vendor Code	Select this check box to indicate whether the value is supplied by a vendor.

Defining Action Types

Access the Action Types page (Set Up SACR > Product Related > Contributor Relations > CR Common Definitions > Actions > Action Types).

Image: Action Types page

This example illustrates the fields and controls on the Action Types page. You can find definitions for the fields and controls later on this 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.

Valid Result Codes	Action types have certain expected outcomes. Result codes might be Accepted, Rejected, Submitted, Gift, or Pledge, for example. However, these are not all valid for every action type. Valid Result Codes are linked directly to Action Types.
Add All Result Codes	Select the Add All Result Codes button to add all existing result codes to the action type. Once all are selected, the user may delete rows that are not pertinent. This is useful if more result codes apply than do not.

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 (Set Up SACR > Product Related > Contributor Relations > CR Common Definitions > Actions > Action Contact Types).

Image: Action Contact Type page

This example illustrates the fields and controls on the Action Contact Type page. You can find definitions for the fields and controls later on this 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 (Set Up SACR > Product Related > Contributor Relations > CR Common Definitions > Actions > Action Status Codes).

Image: Action Status page

This example illustrates the fields and controls on the Action Status page. You can find definitions for the fields and controls later on this 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 (Set Up SACR > Product Related > Contributor Relations > CR Common Definitions > Actions > Action Results).

Image: Action Results page

This example illustrates the fields and controls on the Action Results page. You can find definitions for the fields and controls later on this 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 (Set Up SACR > Product Related > Contributor Relations > CR Common Definitions > Appreciation Items).

Image: Donor Appreciation Items page

This example illustrates the fields and controls on the Donor Appreciation Items page. You can find definitions for the fields and controls later on this 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

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 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 needs of the company. Communications is part of PeopleSoft Campus Community, which is shared by all areas on campus. You might establish some naming conventions for each office that uses communications, to make communications more manageable.

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 "Defining and Securing PeopleSoft Contributor Relations Business Units and SetIDs" (PeopleSoft Campus Solutions 9.2: Application Fundamentals).

- 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 are the basis from which the plan is 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 topic; overview information for all types of initiatives is discussed elsewhere.

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 topic; 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	Definition 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 (Set Up SACR > Product Related > Contributor Relations > Initiatives > Initiative Type Table). 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	Definition 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 (Set Up SACR > Product Related > Contributor Relations > Initiatives > Attribute Type).

Image: Attribute Type page

This example illustrates the fields and controls on the Attribute Type page. You can find definitions for the fields and controls later on this 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

Type	Maximum Field Length
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.

Image: Selecting workset members into an audience

This example illustrates the fields and controls on the Selecting workset members into an audience. You can find definitions for the fields and controls later on this page.

Setting Up Audience Criteria

Access the Audience Criteria page (Set Up SACR > Product Related > Contributor Relations > Initiatives > Audience Criteria). The appearance of this page changes, depending on the audience Selection Process you use.

Image: Audience Criteria page using the Build/Merge process

This example illustrates the fields and controls on the Audience Criteria page using the Build/Merge process. You can find definitions for the fields and controls later on this page.

Image: Audience Criteria page using the Population Selection process

This example illustrates the fields and controls on the Audience Criteria page using the Population Selection process. You can find definitions for the fields and controls later on this page.

Audience Detail Common Fields

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 Process

When you add a new audience criteria using the Audience Criteria search page, your selection process options here depend on the value you enter in the Person/Organization field. If you select *Person* or *Organization* in that field, you can select either the *Build/Merge Process* or *Population Selection* on this page. If you select *Both,* you must use the Population Selection process.

Population Selection

Select this option to use flexible methods to load audience data into the system. This group box appears when the *Population Selection* process is selected.

Population selection is a method for selecting the IDs to process for a specific transaction. The Population Selection group box is a standard group box that appears on run control pages when the Population Selection process is available or required for the transaction. Selection tools are available based on the selection tools that your institution selected in the setup of the Population Selection process for the application process and on your user security. Fields in the group box appear based on the selection tool that you select. The fields behave the same way from within the group box on all run control pages and application processes.

If your institution uses a specific delivered selection tool (PS Query, Equation Engine equation, or external file) to identify IDs for a specific transaction, you must use it.

Warning! Any query you select for audience criteria cannot contain prompts.

See "Using the Population Selection Process" (PeopleSoft Campus Solutions 9.2: Campus Community)

Selection Criteria

Select this option to combine various attributes to narrow the audience. 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 Defining Audiences.
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 for Build/Merge Process

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	Definition 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 (Set Up SACR > Product Related > Contributor Relations > Initiatives > Goal Type Table).

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).

Page Used to Define Methods

Page Name	Definition 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.

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 Defining Action Types.

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 occurs through a telephone call, letter, email, personal visit, and so on.

See Defining Action Contact Types.

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 Defining Action Status Codes.

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 Defining Action Results.

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	Definition 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 (Set Up SACR > Product Related > Contributor Relations > Initiatives > Budget Table).

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 appeals.

• Set up appeal details.

Pages Used to Set Up Appeal Information

Page Name	Definition 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.

Page Name	Definition Name	Navigation	Usage
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 Appeals

Access the Appeal page (Set Up SACR > Product Related > Contributor Relations > Initiatives > Appeal Code Table).

Image: Appeal page

This example illustrates the fields and controls on the Appeal page. You can find definitions for the fields and controls later on this 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 (Set Up SACR > Product Related > Contributor Relations > Initiatives > Appeal Code Table > Appeal Detail).

Image: Appeal Detail page

This example illustrates the fields and controls on the Appeal Detail page. You can find definitions for the fields and controls later on this 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	Definition Name	Navigation	Usage
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 (Set Up SACR > Product Related > Contributor Relations > Initiatives > Campaign Donor Phase Table).

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 (Contributor Relations > Initiatives > Campaign Initiatives > Manage Campaigns > Gift Table).

Image: Gift Table page

This example illustrates the fields and controls on the Gift Table page. You can find definitions for the fields and controls later on this 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 financial goal of a campaign.
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 (Contributor Relations > Initiatives > Campaign Initiatives > Manage Campaigns > Reporting Rules).

Image: Reporting Rules page

This example illustrates the fields and controls on the Reporting Rules page. You can find definitions for the fields and controls later on this 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	Definition 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 (Set Up SACR > Product Related > Contributor Relations > Membership Organizations > Membership Type).

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 (Set Up SACR > Product Related > Contributor Relations > Membership Organizations > Membership Category).

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 the 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	*Definition 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.

Page Name	Definition Name	Navigation	Usage
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.

Related Links
Assigning Volunteers to Roles

Defining Areas of Responsibility

Access the Area of Responsibility page (Set Up SACR > Product Related > Contributor Relations > Initiatives > CR Volunteers > Areas of Responsibility).

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 (Set Up SACR > Product Related > Contributor Relations > Initiatives > CR Volunteers > Assignment Types).

Image: Assignment Type page

This example illustrates the fields and controls on the Assignment Type page. You can find definitions for the fields and controls later on this 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.

Related Links

Defining Areas of Responsibility

Defining Leadership Types

Access the Leadership Types page (Set Up SACR > Product Related > Contributor Relations > Initiatives > CR Volunteers > Leadership Types).

Image: Leadership Types page

This example illustrates the fields and controls on the Leadership Types page. You can find definitions for the fields and controls later on this 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 (Contributor Relations > Initiatives > Volunteer Initiatives > Manage Volunteer Initiatives > Volunteer Goals).

Image: Volunteer Goals page

This example illustrates the fields and controls on the Volunteer Goals page. You can find definitions for the fields and controls later on this 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 (Contributor Relations > Initiatives > Volunteer Initiatives > Initiative Volunteers > Initiative Volunteer Structure).

Image: Volunteer Structure page

This example illustrates the fields and controls on the Volunteer Structure page. You can find definitions for the fields and controls later on this 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, 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 assigning a volunteer to the position.

Defining Subgroups

Access the Sub-Groups page (Contributor Relations > Initiatives > Volunteer Initiatives > Initiative Volunteers > Initiative Volunteer Sub-Group).

Image: Sub-Groups page

This example illustrates the fields and controls on the Sub-Groups page. You can find definitions for the fields and controls later on this page.

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

Vol Sub-Group (volunteer subgroup)	Enter a name for the volunteer subgroup (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.

Related Links

"Defining Campus Events" (PeopleSoft Campus Solutions 9.2: Campus Community)

Chapter 7

Setting Up Commitment Management

Prerequisites for Commitments

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 *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 Student Financials, your fund-raising 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 the range of your department 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. You use gift types on the Gift Entry and Gift Adjustment pages.

Page Used to Define Gift Types

Page Name	Definition 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 that donors make to the institution.

Setting Up Gift Types

Access the Gift Types page (Set Up SACR > Product Related > Contributor Relations > Session Management > Gift Types).

Image: Gift Types page

This example illustrates the fields and controls on the Gift Types page. You can find definitions for the fields and controls later on this 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 (Council for Aid to Education type)	Select the gift type that you are defining. The Council for Aid to Education (CAE) establishes the CAE gift types, which you use to produce the CAE report. *Gift In Kind* gift types 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).

Related Links

AVPCAE, GFTINC, GFTINCII, GFTINCIV − CAE Gift Income Report

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	Definition 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 (Set Up SACR > Product Related > Contributor Relations > Session Management > Tender Types).

Image: Tender Types page

This example illustrates the fields and controls on the Tender Types page. You can find definitions for the fields and controls later on this 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 appear. If you select *Check,* a check number field appears.

Select *Allow Zero Amount* in this field 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* 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,* then the Tender Detail button appears.

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

CAE Real Estate (Council for Aid to Education real estate)	Select if the tender type represents a property gift that you want included in the 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).

Related Links

AVPCAE, GFTINC, GFTINCII, GFTINCIV − CAE Gift Income Report

Defining Designation Types

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

This section provides an overview of designation types and discusses how to set up valid designation types.

Understanding Designation Types

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

Page Used to Define Designation Types

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

Setting Up Designation Types

Access the Designation Types page (Set Up SACR > Product Related > Contributor Relations > Session Management > Designation 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 provides an overview of matching gift types for designations.

Understanding Matching Gift Types for Designations

The values you define on the Matching gift Types 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.

This table lists the values that 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
Non-athletic scholarships	Gifts of securities
Non-athletic building funds	Volunteer time

Page Used to Define Matching Gift Types for Designations

Page Name	Definition 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.

Defining Designation Funds

Important! Letter Generation (Letter Gen) is a deprecated product. Support will be maintained for this product, but no new development will be produced for Letter Gen. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see "Using the Communication Generation Process" (PeopleSoft Campus Solutions 9.2: Campus Community)

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

This section provides an overview of the page used to define designation funds and discusses how to set up designation funds.

Understanding Designation Funds

The Designation Funds page helps 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.

Page Used to Define Designation Funds

Page Name	Definition 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. Also set up default acknowledgement, tribute, and original donor values used during gift entry.

Setting Up a Designation Fund

Access the Designation Funds page (Set Up SACR > Product Related > Contributor Relations > Session Management > Designation Funds).

Image: Designation Funds page (1 of 2)

This example illustrates the fields and controls on the Designation Funds page (1 of 2). You can find definitions for the fields and controls later on this page.

Image: Designation Funds page (2 of 2)

This example illustrates the fields and controls on the Designation Funds page (2 of 2). You can find definitions for the fields and controls later on this page.

Designation Name	Enter the full name of the designation fund.
CASE Type (Council for the Advancement and Support of Education 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 they are used to generate 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 (Council for the Advancement and Support of Education purpose)

Select the specific utilization category of the designation fund as defined by the 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 they are used to generate 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 II of the CAE report.

FASB Type (Financial Accounting Standards Board type)

Select the accounting category for the designation fund as defined by the Financial Accounting Standards Board (FASB). This value is used to generate 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; this 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 to which the designation applies. 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; this 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 Student Financials.
Responsible	Enter the staff member responsible for managing this designation fund.
Formal Description	Enter a long designation description, 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 that it creates to generate both joint and individual letters. The field name is "DesigFormalxxx." To use this field in acknowledgements, modify the acknowledgement template.
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.

Attachments

Click the View link to open the attachment in a new window. Click the Add Attachment button to upload a new attachment from within the component.

Acknowledgements

You are not required to enter an event ID or a 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.

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 their name.

> **Note:** The system does not make sure you do not enter a 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 an *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.

Related Links

AVPCAE, GFTINC, GFTINCII, GFTINCIV − CAE Gift Income Report

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	*Definition 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 (Set Up SACR > Product Related > Contributor Relations > Session Management > Recognition Types). Recognition types are used during the gift and pledge entry acknowledgement processes to recognize donors who made commitments to the institution.

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, then 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	Definition 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 (Set Up SACR > Product Related > Contributor Relations > Session Management > Adjustment Reasons). The adjustment reasons you define here become available for selection in the Reason field on the Gift Adjustment and Pledge Adjustment pages.

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

Preparing for Session Posting

This section provides an overview of session posting and discusses how to:

• Set up item types.

• Complete item type initial setup.

• Define a GL interface.

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

See*PeopleSoft FSCM: Application Fundamentals*

Page Used to Set Up Item Types

Page Name	Definition Name	Navigation	Usage
Initial Setup	ITEM_TYPE_TBL	(Set Up SACR >Product Related >Student Financials >Item Types >Item Types >Initial Setup	Set up item types at your institution.

Understanding 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 Student Financials. This setID is used to retrieve detail calendars and item types from Student Financials.

In simple terms, designations are 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, and then associate them with designations in Contributor Relations when you define designation funds using the Designation Funds page.

In PeopleSoft Financials, you must:

- Set up budget periods.

- Define journal entry definitions.

- Define a journal source.

- Define journal generator template defaults.

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

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 journal set requires different debit and 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. This table defines the values that must exist; otherwise, the posting process will 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 into the system, you select a tender type that is tied to an item type with a journal set of 0, which 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), which 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.

Related Links
Processing and Posting Sessions

Completing Item Type Initial Setup

Use the Initial Setup page (ITEM_TYPE_TBL) to begin the process of setting up item types at your institution. The Initial Setup page is part of PeopleSoft Student Financials (Set Up SACR > Product Related > Student Financials > Item Types > Item Types > Initial Setup

Image: Initial Setup page

This example illustrates the fields and controls on the Initial Setup page. You can find definitions for the fields and controls later on this page.

G/L Interface Required	Select this check box to indicate that both a credit and debit side of each transaction are required.
Accounting Date Control	If you select the GL Interface Required check box, this field becomes active. Specify the accounting date of the item type. Select from the following values:

Run Date: Select to use the current date as the accounting date.

Item Effective Date: Select to use the applicable gift date, pledge effective date, or membership start date as the accounting date.

The Accounting Date Control value that you select affects the Journal Line Date field on the Accounting Line page (Contributor Relations > Session Management > Supervise Sessions > Accounting Line Summary) as generated by the Contributor Relations GL Interface process.

Note: For both sides of your institution's dual line accounting to be generated correctly in the GL Interface process, you must select the Accounting Date Control for both tender and designation item types on the Item Type Setup page.

Classification	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.

Related Links

"Setting Up Item Types and Item Type Groups" (PeopleSoft Campus Solutions 9.2: Student Financials)

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 the system displays on this page, select PeopleTools > Utilities > Administration > Table Set Control and then 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 a credit row or rows for the designation account or accounts. 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 a gift of 100 USD to a single designation:

Image: Scenario 1, in which the gift results in a Tender Asset Account debit of 100.00 USD and a Designation Account credit of 100.00 USD

This graphic illustrates Scenario 1, in which the gift results in a Tender Asset Account debit of 100.00 USD and a Designation Account credit of 100.00 USD:

Scenario 2

Donor makes a gift of 100 USD to two designations:

Image: Scenario 2, in which the gift results in a Tender Asset Account debit of 100.00 USD and two Designation Account credits of 50.00 USD each

This graphic illustrates Scenario 2, in which the gift results in a Tender Asset Account debit of 100.00 USD and two Designation Account credits of 50.00 USD each:

Scenario 3

Donor makes a semiannual pledge of 1000 USD to a single designation that is fed to the GL (multiple designations would be credited, as in Scenario 2):

Image: Scenario 3 (1 of 3), in which the pledge results in an Accounts Receivable debit of 1000.00 USD and a Designation Account credit of 1000.00 USD

This graphic illustrates Scenario 3 (1 of 3), in which the pledge results in an Accounts Receivable debit of 1000.00 USD and a Designation Account credit of 1000.00 USD:

Donor makes a semiannual pledge payment of 500 USD for the previous pledge:

Image: Scenario 3 (2 of 3), in which the pledge payment results in two Accounts Receivable credits of 500.00 USD each and two Tender Asset Account debits of 500.00 USD each

This graphic illustrates Scenario 3 (2 of 3), in which the pledge payment results in two Accounts Receivable credits of 500.00 USD each and two Tender Asset Account debits of 500.00 USD each:

Donor makes final pledge payment of 500 USD for the previous pledge:

Image: Scenario 3 (3 of 3), in which the pledge payment results in an Accounts Receivable credit of 500.00 USD and a Tender Asset Account debit of 500.00 USD

This graphic illustrates Scenario 3 (3 of 3), in which the pledge payment results in an Accounts Receivable credit of 500.00 USD and a Tender Asset Account debit of 500.00 USD:
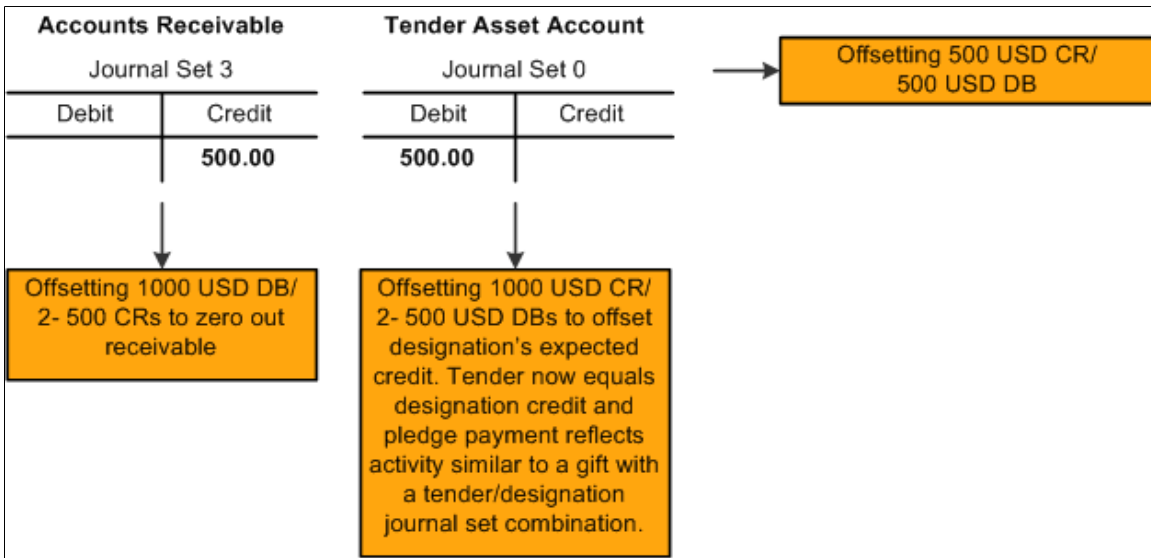
Scenario 4

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

Image: Scenario 4 (1 of 4), in which the gift results in a Tender Asset Account debit of 100.00 USD and a Designation Account credit of 100.00 USD

This graphic illustrates Scenario 4 (1 of 4), in which the gift results in a Tender Asset Account debit of 100.00 USD and a Designation Account credit of 100.00 USD:
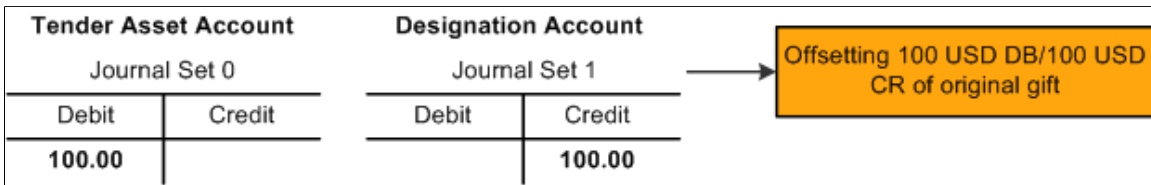
Original gift is backed out with offsetting reversal entries that takes the original gift to zero:

Image: Scenario 4 (2 of 4), which the reversal results in a Tender Asset Account credit of 100.00 USD and a Designation Account debit of 100.00 USD

This graphic illustrates Scenario 4 (2 of 4), which the reversal results in a Tender Asset Account credit of 100.00 USD and a Designation Account debit of 100.00 USD:
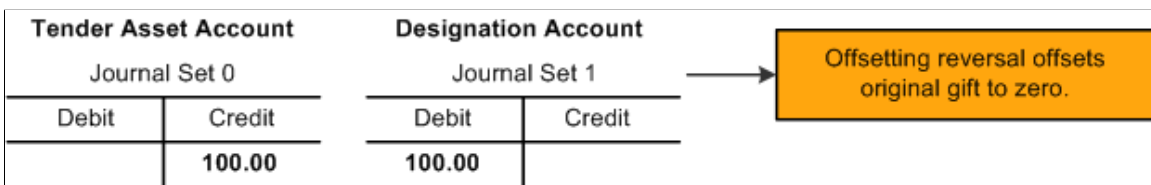
The refund amount is entered to be offset when a refund is generated manually:

Image: Scenario 4 (3 of 4), in which the offsetting 90.00 USD debit to the tender account and the 90.00 USD credit to the clearing account will be zeroed out with reversing entries when the refund is manually generated

This graphic illustrates Scenario 4 (3 of 4), in which the offsetting 90.00 USD debit to the tender account and the 90.00 USD credit to the clearing account is zeroed out with reversing entries when the refund is manually generated:

The new corrected gift is created:

Image: Scenario 4 (4 of 4), in which the corrected gift results in a Tender Asset Account debit of 10.00 USD and a Designation Account credit of 10.00 USD

This graphic illustrates Scenario 4 (4 of 4), in which the corrected gift results in a Tender Asset Account debit of 10.00 USD and a Designation Account credit of 10.00 USD:

Related Links

"Creating Accounting Entries Using the GL Interface Process" (PeopleSoft Campus Solutions 9.2: Student Financials)

Preparing for Acknowledgement Letters and Receipts

Various pages in the system affect 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 of 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 runs, 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 IDs or roles.

Defining Acknowledgement Rules

Important! Letter Generation (Letter Gen) is a deprecated product. Support will be maintained for this product, but no new development will be produced for Letter Gen. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see "Using the Communication Generation Process" (PeopleSoft Campus Solutions 9.2: Campus Community)

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

This section lists common elements and discusses how to:

• Set up acknowledgements.

• Continue Acknowledgement setup.

• Complete Acknowledgement setup.

Note: The rules you set up here enable the system to determine which letter a donor should receive or whether the acknowledgement should be assigned to a role so that 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 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 suppresses 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 and **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. Selecting a value for one field clears the other field.

Pages Used to Define Acknowledgement Rules

Page Name	Definition 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 (Set Up SACR > Product Related > Contributor Relations > Session Management > Acknowledgement Setup > Acknowledgement Setup1).

Image: Acknowledgement Setup1 page

This example illustrates the fields and controls on the Acknowledgement Setup1 page. You can find definitions for the fields and controls later on this page.

The system looks at service indicators set on this page for both people and organizations when generating acknowledgements.

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 (Set Up SACR > Product Related > Contributor Relations > Session Management > Acknowledgement Setup > Acknowledgement Setup2).

Image: Acknowledgement Setup2 page

This example illustrates the fields and controls on the Acknowledgement Setup2 page. You can find definitions for the fields and controls later on this 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, then 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 (Set Up SACR > Product Related > Contributor Relations > Session Management > Acknowledgement Setup > Acknowledgement Setup3).

Image: Acknowledgement Setup3 page

This example illustrates the fields and controls on the Acknowledgement Setup3 page. You can find definitions for the fields and controls later on this 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, restrictions, and required information.

Page Used to Define an Organization's Matching Gift Rules

Page Name	Definition Name	Navigation	Usage
Matching Gift Rules	AV_MTCH_ORG_RULES	• Contributor Relations, Session Management, Matching Gifts, Add/Update Matching Rules, Matching Gift Rules • Contributor Relations, Session Management, Matching Gifts, Matching Rules - Workset	Enter information about an organization's match amount, ratio, and budget rules; eligible and ineligible designation type, gift types, alumni statuses, and employee statuses; and contacts for an organization's matching gift program.

Setting Up Matching Gift Rules, Restrictions, and Required Information

Access the Matching Gift Rules page (Contributor Relations > Session Management > Matching Gifts > Add/Update Matching Rules > Matching Gift Rules).

Image: Matching Gift Rules page (1 of 2)

This example illustrates the fields and controls on the Matching Gift Rules page (1 of 2). You can find definitions for the fields and controls later on this page.

Image: Matching Gift Rules page (2 of 2)

This example illustrates the fields and controls on the Matching Gift Rules page (2 of 2). You can find definitions for the fields and controls later on this 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 for 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.
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.

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.
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.

Annual Matching Gift Budget

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.

Match Detail

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

Ratio and **To 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.
Minimum Match Amount and **Maximum Match 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 to 25,000 USD, then 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.

Restrictions

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.

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.

Attachments

You can view existing attachments to the organization's matching gift rules record and add new ones. Click the View link to open the attachment in a new window. Click the Add Attachment button to upload a new attachment from within the component.

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.

Contacts	Click this button to access the page where contact information can be updated.
Contact Information	This area displays phone types and phone numbers for matching gift contacts.

Defining Giving Club Information

This section discusses how to:

• Define giving clubs.

• Define giving club levels.

Pages Used to Define Giving Club Information

Page Name	*Definition 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 (Contributor Relations > Session Management > Giving Clubs > Giving Club Management > Giving Club Rules).

Image: Giving Club Rules page

This example illustrates the fields and controls on the Giving Club Rules page. You can find definitions for the fields and controls later on this 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 appear 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 appear in the prompt box.

Defining Giving Club Levels

Access the Giving Club Levels page (Contributor Relations > Session Management > Giving Clubs > Giving Club Management > Giving Club Levels).

Image: Giving Club Levels page

This example illustrates the fields and controls on the Giving Club Levels page. You can find definitions for the fields and controls later on this 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.

Pages Used to Set Up Credit Card Processing

Page Name	Definition 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. There is a 1:1 relationship between a Merchant ID and 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 a credit card processing agency, such as 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 the credit card processing agency.

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.

For more information, refer to the "PeopleSoft Credit Card Interlink Installation and Technical Notes" in My Oracle Support (ID 701412.1).

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.

Related Links
Defining Tender Types

Defining Credit Card Types

Access the Credit Card Type page (Set Up SACR > Product Related > Contributor Relations > Session Management > Credit Card Type).

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 a Third-Party Processor

Access the CR Merchants page (Set Up SACR > Product Related > Contributor Relations > Session Management > Merchant Table).

Image: CR Merchants page

This example illustrates the fields and controls on the CR Merchants page. You can find definitions for the fields and controls later on this page.

Payment Merchant	Select a third-party payment merchant to be used for processing credit card transactions. There are no delivered values for this field.
	Consult the *Electronic Payment Integration Developer's Reference Guide* in My Oracle Support (ID 1982664.1) to determine how to set up your electronics payments implementation. The document explains how to set up the lower levels of the Integration Broker-based solutions, up to and including the payment merchant, which is referred to in this section.
	Payment merchants are defined on the Payment Merchant page (Set Up SACR > Common Definitions > Electronic Payments > Payment Merchant).
Security Code Supported	This read-only check box field reflects the setting of the corresponding field on the underlying Payment Merchant page. It controls the display of the Security Code entry field and the What is a security code? link on the self-service and session entry pages. When this check box is selected, the Security Code - Self Service and Security Code - Batch check boxes appear on this page.

Credit Card

Security Code - Self Service	Select this check box to enable the display of the Security Code field and associated message in the self-service Involvement payment pages.
Security Code - Batch	Select this check box to enable the display of the Security Code field and associated message in the Tender Type Detail pages for gift and membership entry.
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.

Default Options

Type of Name	Select the type of name *(Primary, Preferred, Legal,* and so on) to 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) to 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) to 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) to 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.

Related Links

"Adding or Updating Biographical Details Data" (PeopleSoft Campus Solutions 9.2: Campus Community)

"Creating Contributor Relations Business Units" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

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, you must complete eight pages 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.

• Enter a web campaign narrative.

• Define campaign linked designations.

• Define campaign linked appeals.

• 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	Definition 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.

Page Name	Definition Name	Navigation	Usage
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 select 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 select 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 (Set Up SACR > Common Definitions > Self Service > Involvement > Involvement > Involvement Setup).

Image: Involvement Setup page (1 of 2)

This example illustrates the fields and controls on the Involvement Setup page (1 of 2). You can find definitions for the fields and controls later on this page.

Image: Involvement Setup page (2 of 2)

This example illustrates the fields and controls on the Involvement Setup page (2 of 2). You can find definitions for the fields and controls later on this page.

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 Maintaining Constituent Types.

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 Campus Solutions 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 Setting Up Credit Card Processing.

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 Defining Tender Types.

Defining Web Designations

Access the Web Designations page (Set Up SACR > Common Definitions > Self Service > Involvement > Involvement > Web Designations).

Image: Web Designations page

This example illustrates the fields and controls on the Web Designations page. You can find definitions for the fields and controls later on this 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 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 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 selects 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 selects 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 select pledge distribution information on the Make a Donation - Pledge Information page.

Defining Web Appeals

Access the Web Appeals page (Set Up SACR > Common Definitions > Self Service > Involvement > Involvement > Web Appeals).

Image: Web Appeals page

This example illustrates the fields and controls on the Web Appeals page. You can find definitions for the fields and controls later on this 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 select which appeal they are responding to.
Pledges	Select to make the appeal available for self-service pledges. These selections become available when donors select 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 (Set Up SACR > Common Definitions > Self Service > Involvement > Involvement > Web Campaigns).

Image: Web Campaigns page

This example illustrates the fields and controls on the Web Campaigns page. You can find definitions for the fields and controls later on this 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.
Gifts	Select to make the campaign available for self-service gifts. Additionally, the campaign appears 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.
Narrative	Click to access the Web Campaign Narrative page, where you can enter a longer description of the campaign that self-service donors see on the Donations - Campaigns page.

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 (Click the Narrative link on the Web Campaigns 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 (Click the Link Desig link on the Web Campaigns 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 fields 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, then 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, then the check box appears here but is unavailable for input.

Gift Default and **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 decide 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 (Click the Link Appeal link on the Web Campaigns 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 field 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 and **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 select 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 (Set Up SACR > Product Related > Contributor Relations > CR Product-Related > Gift and Pledge > Involvement > Giving Vehicles).

Image: Giving Vehicles page

This example illustrates the fields and controls on the Giving Vehicles page. You can find definitions for the fields and controls later on this 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

Searching for Records

This section provides an overview of records and discusses how to use Search/Match functionality.

Understanding Records

Contributor Relations uses Search/Match functionality to search for constituent records. The search and results pages are identical to those used by Campus Community, and they enable you to search for specific people based on basic information such as name and address. Use this page to ensure that a person does not already have an existing record before you add the person to the system.

Pages Used to Search for Records

Page Name	Definition Name	Navigation	Usage
Search Criteria	HCR_SM_SEARCH	Contributor Relations > Constituent Information > People > Search/Match	Specify sets of criteria and arrange them in order for searching for duplicate or multiple records.
Search Results	HCR_SM_RESULTS	Click the Search button on the Search Criteria page.	View search results that are based on the criteria you entered on the Search Criteria page.

Using Search/Match Functionality

To avoid entering duplicate personal records, use 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 records. 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.

To set up Search/Match for Contributor Relations, use the delivered search parameters and result codes. These predefined sample searches are PSCS_CR SEARCH for Person and Org. These delivered search parameters enable you to include fields specific to Contributor Relations in your search results set.

Example

Here is an example of Contributor Relations-specific Search/Match functionality that an institution might use:

Image: Search Criteria page (1 of 2)

This example illustrates the fields and controls on the Search Criteria page (1 of 2). You can find definitions for the fields and controls later on this page.

Image: Search Criteria page (2 of 2)

This example illustrates the fields and controls on the Search Criteria page (2 of 2). You can find definitions for the fields and controls later on this page.

Here are the results of the search in this example:

Image: Search Results page

This example illustrates the fields and controls on the Search Results page. You can find definitions for the fields and controls later on this page.

Related Links

"Setting Up Search/Match" (PeopleSoft Campus Solutions 9.2: Campus Community)

Adding People to the System

This section lists the pages used 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 "Adding an Individual to Your Database" (PeopleSoft Campus Solutions 9.2: Campus Community)"Adding or Updating Biographical Details Data" (PeopleSoft Campus Solutions 9.2: Campus Community)

Pages Used to Add People to the System

Page Name	Definition 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	Definition Name	Navigation	Usage
Update Linked Addresses	RUNCTL_ADDRLINK	• Campus Community > Personal Information > Biodemo Processes > Update Linked Addresses • Contributor Relations > Constituent Information > People > Process Biodemo Information > 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.

Related Links
"Updating Linked Addresses" (PeopleSoft Campus Solutions 9.2: Campus Community)

Reviewing Address Data

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

Related Links
"Entering Addresses for an Individual" (PeopleSoft Campus Solutions 9.2: Campus Community)

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.

Related Links

"Entering Electronic Address Data" (PeopleSoft Campus Solutions 9.2: Campus Community)

Tracking External System IDs

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

Related Links

"Changing Individual IDs" (PeopleSoft Campus Solutions 9.2: Campus Community)

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.

Related Links

"Managing Names Data" (PeopleSoft Campus Solutions 9.2: Campus Community)

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	Definition 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 (Contributor Relations > Constituent Information > People > Relationships > Constituent Types).

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 a relationship with your institution. For example, if a constituent has a value of *Parent* and the child graduates, then 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.

Related Links
"Entering Religious Preferences" (PeopleSoft Campus Solutions 9.2: Campus Community)

Maintaining Photos

You can store photographs of your constituents. Photographs are stored the same way that they are stored in any Microsoft Windows application.

Related Links
"Entering Photographs" (PeopleSoft Campus Solutions 9.2: Campus Community)

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	*Definition Name*	*Navigation*	*Usage*
Graduates To Alumni	AV_RUNCTL_CONFR	Contributor Relations > Constituent Information > People > Process Biodemo Information > 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 (Contributor Relations > Constituent Information > People > Process Biodemo Information > Graduates to Alumni).

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..* You can run this report using the BI Publisher option.

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	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.

Related Links
Defining Constituent Types
Assigning Constituent Types
"Tracking Graduation Progress" (PeopleSoft Campus Solutions 9.2: Student Records)
Contributor Relations Reports: Selected Reports

Maintaining Degree Information

This section discusses how to:

- Maintain external degree information.

- View an academic summary.

- 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	Definition 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.
Academic Information Summary	AV_ACAD_SUMM	Contributor Relations > Constituent Information > People > Academic Information > Academic Information Summary	View a summary of information about a constituent's internal, external, and legacy degrees.
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 appears 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 (Contributor Relations > Constituent Information > People > Academic Information > External Degrees).

Image: External Degrees page

This example illustrates the fields and controls on the External Degrees page. You can find definitions for the fields and controls later on this page.

Org ID (organization 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 the constituent concentrated on specific subject areas or fields 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 is saved.

Org Primary Location (organization 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 about the school.

Viewing an Academic Summary

Access the Academic Information Summary page (Contributor Relations > Constituent Information > People > Academic Information > Academic Information Summary).
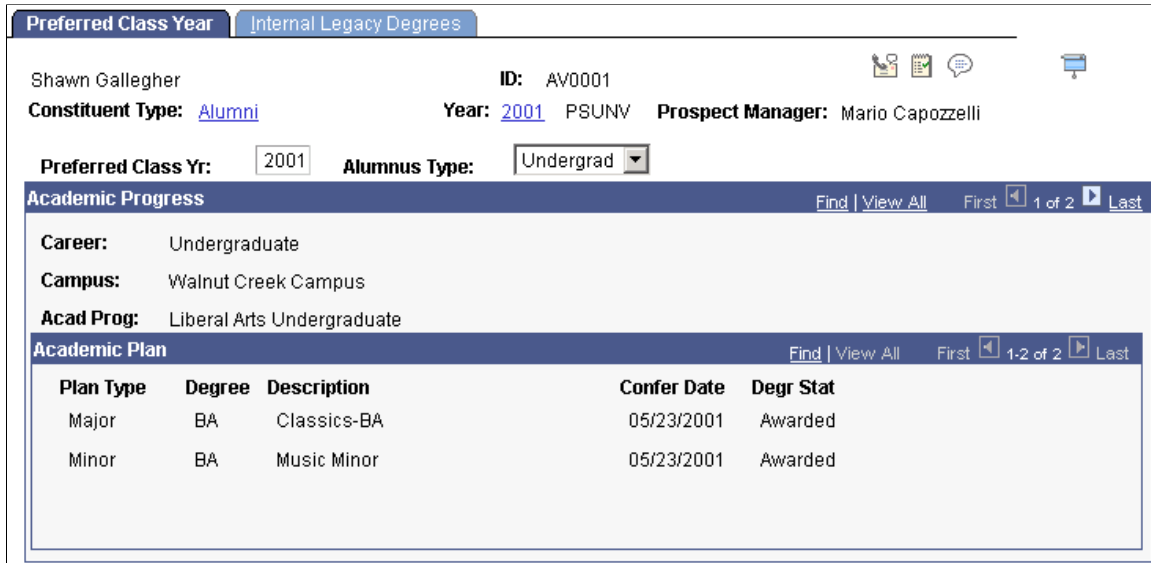
This page displays a combined view of all degree information about a constituent in the system. This information includes degrees earned at your institution and at institutions other than your own.

Setting a Constituent's Preferred Year

Access the Preferred Class Year page (Contributor Relations > Constituent Information > People > Academic Information > Class Year > Preferred Class Year).

Image: Preferred Class Year page

This example illustrates the fields and controls on the Preferred Class Year page. You can find definitions for the fields and controls later on this 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 appears 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 appears on this page.

Entering Internal Legacy Degree Information

Access the Internal Legacy Degrees page (Contributor Relations > Constituent Information > People > Academic Information > Class Year > Internal Legacy Degrees).

Image: Internal Legacy Degrees page

This example illustrates the fields and controls on the Internal Legacy Degrees page. You can find definitions for the fields and controls later on this page.

Enter values in the Class Year, Attended From and To dates, Degree, Major, Major 2, Minor, Minor 2, Campus, and Acad Org (academic organization) fields. List any distinctions earned with the degree in the Distinction field.

Note: The information on this page is stored in the PeopleSoft Student Records system.

Maintaining Work Experience Information

This section lists the pages used to maintain a constituent's work experience information.

Pages Used to Maintain Work Experience Information

Page Name	Definition Name	Navigation	Usage
Work Experience	PRIOR_WORK_EXP	• 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.

Page Name	*Definition Name*	*Navigation*	*Usage*
Work Experience	AV_EMPL_HIST	Contributor Relations > Constituent Information > People > Relationships > Work Experience History	View a constituent's employment history.
Employment History Detail	AV_EMPL_HIST_SP	Click the Detail link on the Work Experience inquiry 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.

Creating Constituent Attachments

This section provides an overview of constituent attachments discusses how to create and view attachments to constituent records.

Understanding Constituent Attachments

When you create an attachment to a person, organization, or prospect level, you are attaching the file to the highest level of the record; this is the most global level at which you can attach a file. However, prospects are slightly different because menu security can be assigned to prospect records, restricting access to prospect attachments.

Page Used to Create Constituent Attachments

Page Name	*Definition Name*	*Navigation*	*Usage*
Constituent Attachments	AV_CNST_ATCH AV_CNST_ATCH_E	• Contributor Relations, Constituent Information, People, Person Attachments • Contributor Relations, Constituent Information, People, Organization Attachments	Create and view attachments to a person or organization record.

Creating Attachments

Access the Constituent Attachments page (Contributor Relations > Constituent Information > People > Person Attachments).

Image: Constituent Attachments page, Attachments tab

This example illustrates the fields and controls on the Constituent Attachments page, Attachments tab. You can find definitions for the fields and controls later on this page.
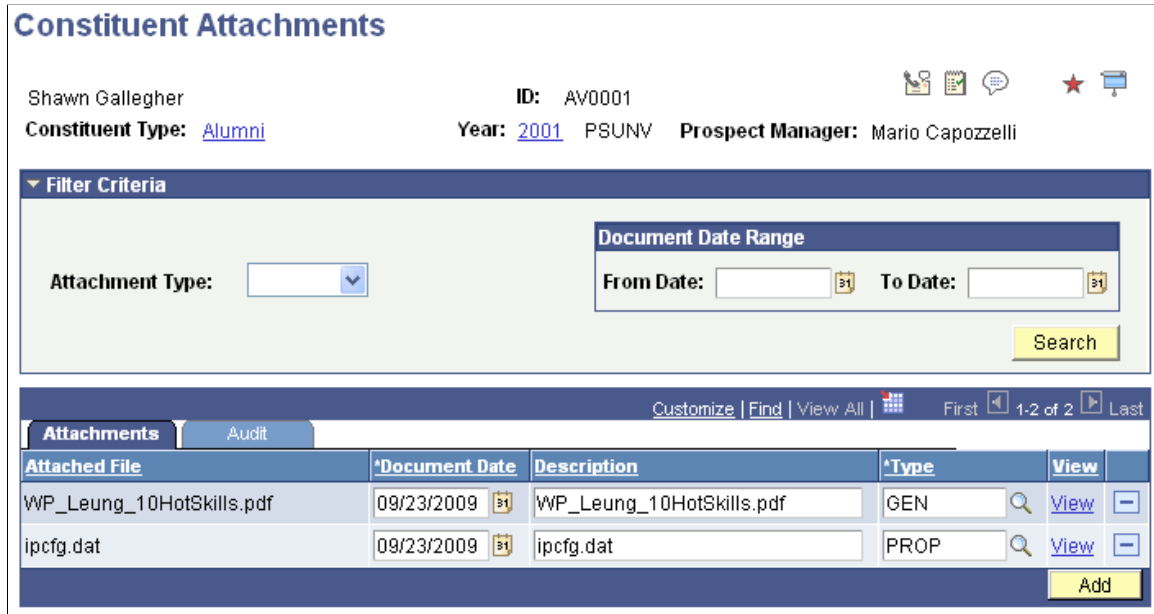
Attachment Type	Select a value to filter the list of attachments that appear based on type. The values available in this drop-down list are driven by the constituent; the system only displays types that have been assigned to the ID.
Document Date	The system displays the date that the document was created or last updated. This is not the date that the file was attached.
Type	Select a value; the system only displays types that have been defined on the Attachment Types page.
View	Click the link to open the attachment in a new window.
Add	Click to access standard PeopleTools functionality to browse to a file and upload it.

Image: Constituent Attachments page, Audit tab

This example illustrates the fields and controls on the Constituent Attachments page, Audit tab. You can find definitions for the fields and controls later on this page.

The Audit tab displays all updates to attachments, including user name and date/time. You can also filter attachments by a Document Date Range.

Related Links

Viewing a Biographic Profile

Adding Organizations

Use the Organization Table component to add external organizations to the system.

Related Links

"Creating Organization Records" (PeopleSoft Campus Solutions 9.2: Campus Community)

Entering Location Data for Organizations

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

Related Links

"Entering Organization Location Data" (PeopleSoft Campus Solutions 9.2: Campus Community)

Entering Department Data for Organizations

Use the Organization Department Detail component to record information at the department level for an organization. Organization departments should be entered after organization locations and before organization contacts.

Related Links
"Entering Organization Department Data" (PeopleSoft Campus Solutions 9.2: Campus Community)

Entering Contact Data for Organizations

Use the Contact Detail 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.

Related Links
"Entering Organization Contact Data" (PeopleSoft Campus Solutions 9.2: Campus Community)

Maintaining an Organization's Financial Information

This section discusses how to enter an organization's financial information.

Page Used to Maintain Organization Financial Information

Page Name	Definition 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 about the organization.

Entering an Organization's Financial Information

Access the Organization Financial Info page (Contributor Relations > Constituent Information > Organization > Organization Information > Organization Financial Info).

Image: Organization Financial Info page

This example illustrates the fields and controls on the Organization Financial Info page. You can find definitions for the fields and controls later on this page.

Employee Count	Enter the number of people currently employed at the organization.
Alumni Count	Displays the total number of alumni who are employees of the organization. The system calculates the total of alumni based on both the number of work experience records and the number of relationships related to an organization ID. Define these relationships on the Person/Org Relationships page.
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 and **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 Foundation Information

Use the Organization Foundation component to define and manage foundation-specific information for external organizations that may be approached for foundation support. You can track and view foundation interests and proposal requirements.

This section discusses how to:

*   Define basic foundation information.

*   Define foundation support information.

*   Define proposal information.

Related Links

Viewing an Organization's Foundation Information

Pages Used to Define Organization Foundation Information

Page Name	Definition Name	Navigation	Usage
Foundation	AV_ORG_FND_INFO	Contributor Relations > Constituent Information > Organizations > Organization Information > Organization Foundation Information	The Foundation Information component assists in tracking philanthropic foundations that support or may support your institution. It also enables you to track specific interests of the foundation that can later be used to identify prospects for particular funding projects.
Support Areas	AV_ORG_FND_SUPP	Contributor Relations > Constituent Information > Organizations > Organization Information > Organization Foundation Information > Support Areas	Store data that can be used to data mine for foundation donors that have a good potential for funding a proposal for a specific project.
Proposal Info (proposal information)	AV_ORG_FND_PROP	Contributor Relations > Constituent Information > Organizations > Organization Information > Organization Foundation Information > Proposal Info	Enter information related to the application process for the foundation.

Defining Basic Foundation Information

Access the Foundation page (Contributor Relations > Constituent Information > Organizations > Organization Information > Organization Foundation Information).

Image: Foundation page

This example illustrates the fields and controls on the Foundation page. You can find definitions for the fields and controls later on this page.

Basic Information

Parent Company	Select the external organization that is the parent of the foundation. The Create Relationship link enables you to create an organization-to-organization relationship if one is not defined in the system.
Established	The date on which the organization was established.
Foundation	Indicate whether a foundation is company-sponsored, private, family-based, and so on. *Corporate, Family,* and *Private* are delivered values.

Purpose and Activities

Enter a brief description of the reason for the foundation's existence and the types of activities in which it engages.

Financial Information

Use the fields in this group box to enter the foundation's financial data.

Fiscal Year	The financial reporting year for which the financial data is pertinent.
From Date and **To Date**	The first and last date of the fiscal year to which the data pertains.
Assets Amount	The financial holdings of the foundation.
Expenditures Amount	The amount of expenses the foundation had in the related year.
Distribution Amount	The amount of funding available to be distributed as grants or funded proposals.
Date	The date the information was obtained from the source.
Source	The originator of the foundation financial information, for example the Foundation Directory.
Grants Amount	The amount actually funded, which may differ from the distribution amount if all funding is not awarded.
Highest Grant Amount	The largest grant awarded by the foundation.
Lowest Grant Amount	The smallest grant awarded by the foundation.
Average Grant Amount	The typical amount of a grant or proposal funded by the foundation.

Defining Foundation Support Information

Access the Support Areas page (Contributor Relations > Constituent Information > Organizations > Organization Information > Organization Foundation Information > Support Areas).

Image: Support Areas page

This example illustrates the fields and controls on the Support Areas page. You can find definitions for the fields and controls later on this page.
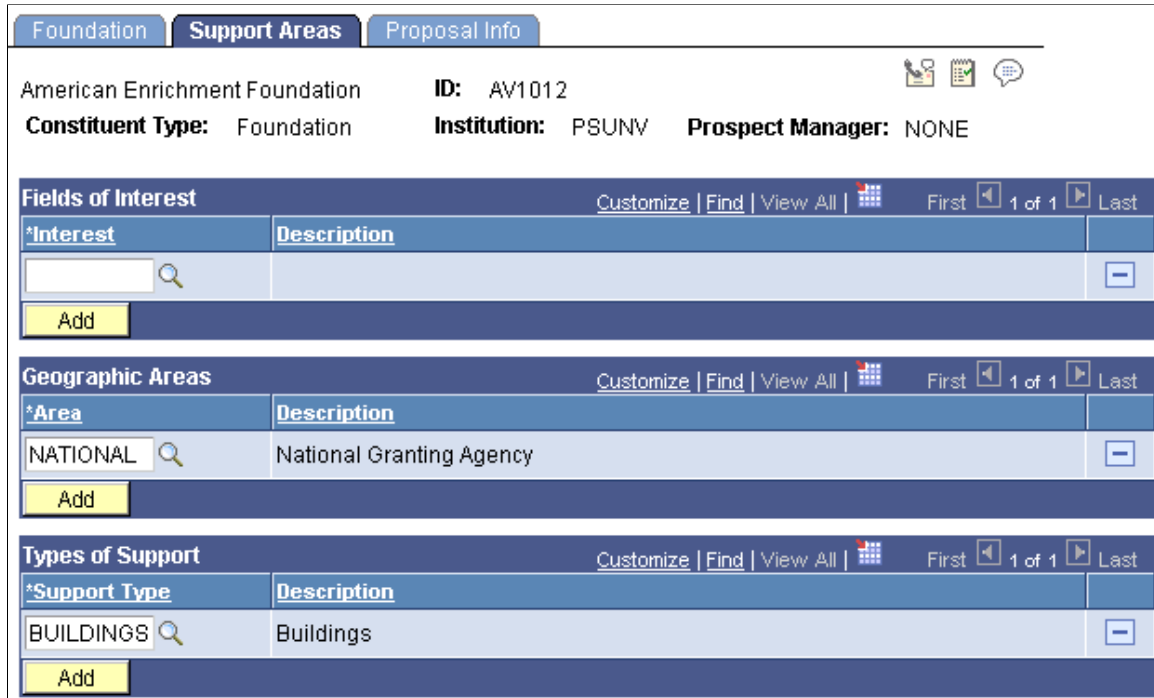
Fields of Interest	Enter areas of charitable interest involvement that the foundation is known to support financially. The involvement code description appears at the right.
Geographic Areas	Enter any geographic restrictions that the foundation considers when selecting proposals for funding. The description appears at the right.
Types of Support	Indicate the kinds of activities the foundation supports. Delivered system values include: *Capital Campaigns, Building/ Renovation, Equipment, Program Development, Seed Money, Curriculum Development,* and *Matching/Challenge.*

Defining Proposal Information

Access the Proposal Info page (Contributor Relations > Constituent Information > Organizations > Organization Information > Organization Foundation Information > Proposal Info).

Image: Proposal Info page

This example illustrates the fields and controls on the Proposal Info page. You can find definitions for the fields and controls later on this page.

Contact Type and **Contact**	The organization contact that is responsible for proposal reviews for the foundation.
Deadlines	The months and dates, such as March 15, each year that the foundation sets as the cutoff date for submitting proposals for consideration by the foundation.
Board Meeting Dates	The months and dates, such as March 15, when the foundation board meets to review proposals.
Notification Dates	The months and dates, such as March 15, by which the foundation notifies applicants of the success of their submitted proposals.

Viewing an Organization's Foundation Information

Use the Review Organization Foundation and Foundation Summary components to view foundation information entered in the system. You can review the data that was entered in the Organization Foundation component and you can also filter and review foundation information based on your criteria.

This section discusses how to:

- Review foundation information.

- Filter foundation records.

Related Links
Defining an Organization's Foundation Information

Pages Used to View an Organization's Foundation Information

Page Name	Definition Name	Navigation	Usage
Organization Foundation Information	AV_ORG_FND_INQ	Contributor Relations > Constituent Information > Organizations > Organization Information > Review Foundation Information	This component can be used to review foundation information or to search for foundations that might be prospects for a specific project based on foundation funding interests and timing.
Foundation Filter	AV_ORG_FND_INQ_F	Contributor Relations > Constituent Information > Organizations > Organization Information > Foundation Summary	Filter the types of foundations that you view on the Foundation Summary page.
Foundation Summary	AV_ORG_FND_INQ_D	Contributor Relations > Constituent Information > Organizations > Organization Information > Foundation Summary > Foundation Summary	View a list of the foundation records that match the filter criteria that you specify on the Foundation Filter page.

Reviewing Foundation Information

Access the Organization Foundation Information page (Contributor Relations > Constituent Information > Organizations > Organization Information > Review Foundation Information).

This page presents a summary of an organization's foundation details that exist in the system.

Proposal Information   Click this link to access the Proposal Information page.

Filtering Foundation Records

Access the Foundation Filter page (Contributor Relations > Constituent Information > Organizations > Organization Information > Foundation Summary).

This page enables you to search for foundation records based on financial criteria, fields of interest, geographic area, and types of support. Click the Search button and view the search results on the Foundation Summary page.

Defining 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.

Related Links

Defining an Organization's Matching Gift Rules

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.

Related Links

Viewing an Organization's Matching Gift Rules

Reviewing an Organization's 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.

Related Links

"Reviewing Organization Data" (PeopleSoft Campus Solutions 9.2: Campus Community)

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	Definition Name	Navigation	Usage
Employee List	AV_EMPL_LIST_E AV_EMPL_LIST_W	• Contributor Relations > Constituent Information > 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

Access the Employee List page (Contributor Relations > Constituent Information > Organizations > Relationships > Employee List). Each employee name appears as a link. Click any name link to access the Person Profile page for that employee and read more about the person.

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.

Related Links

Building a Workset From a Page in the System

Viewing a Person Profile

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.

Related Links

Viewing a Prospect 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
Biographic Information	Biographic
Address	Biographic
Phone Numbers	Biographic
Email Addresses	Biographic
Work Experience	Biographic
Academic Information	Biographic
Relationships	Biographic
Relationship Academic Information	Biographic
Organization Contacts	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.

Page Used to View a Person Profile

Page Name	Definition 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.

Viewing General Person Profile Information

Access the Person Profile page (Contributor Relations > Constituent Information > People > Person Profile).

Image: Person Profile page (1 of 4)

This example illustrates the fields and controls on the Person Profile page (1 of 4). You can find definitions for the fields and controls later on this page.
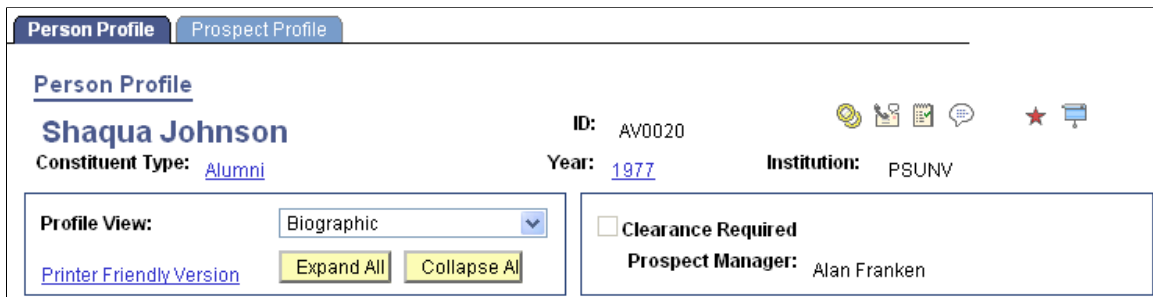
The default settings that determine what you see—which profile views expand, as well as the address, phone, and email views that appear—are defined on the Operator Defaults page.

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), 3Cs buttons, and a button to access the FERPA Bio Demo page.

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, then *None* appears here as a link. Click the link to access the Academic Information inquiry component.
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 name of the region 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 using your browser's print functionality.
	Click the Return button to return to the Person Profile page.
Expand All and **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. Set Clearances 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.
Lifetime Giving Historical Giving	No data exists.	No Giving Information on file.

Data Region	Condition	Message
	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.
Academic Information	No data exists.	No Academic Information on file.
Relationships	No data exists.	No Relationship information on file.
Relationship Academic Information	No data exists.	No Academic Information is on file for any related person.
Attachments	No attachments exist.	No Constituent Attachments on file.
Organization Contacts	No data exists.	Not an Organization Contact.
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.

Related Links

"Understanding FERPA Privacy Control" (PeopleSoft Campus Solutions 9.2: Campus Community)

Viewing a Biographic Profile

Access the Person Profile page, Biographic Profile view.

Image: Person Profile page (2 of 4)

This example illustrates the fields and controls on the Person Profile page (2 of 4). You can find definitions for the fields and controls later on this page.

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 / Email	Phone Numbers
	Electronic Addresses
Biographic Information	Bio/Demo Data
	Religious Preferences
	Relationships
	Decedent Data
Work Experience	Work Experience

Information Section	Page
Academic Information	Academic Information Summary
Relationships	Relationships Person to Org Relationships
Attachments	Constituent Attachments
Organization Contacts	Organization Contacts Organization Contact Detail

Biographic Information

This data region displays compiled biographical data, including date of death.

Date of Death	If the constituent is deceased, and the Decedent Data page contains a date of death, the system displays it here.

Address

If the most current address is inactive, it appears in the grid.

Address Type	Select the type of address that you want to appear. The system displays active addresses; inactive addresses do not appear. If a seasonal address is in effect, the system indicates that by displaying a "Seasonal" message.

Phone Numbers

Phone Type	Select the type of phone information that you want to appear.
Preferred	The check box is selected next to the preferred phone number on file in the system.

Email Addresses

Email Type	Select the type of email address information that you want to appear.
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.
Preferred	The check box is selected next to the preferred email address on file in the system.

Work Experience

Employer   Click a link to access the Employment History Detail page for
                                             the constituent.

Academic Information

This grid displays a combined view of all degree information about this constituent. This information
includes both internal and external degrees .

Relationships

Relationship   Click a link to access the Relationship Detail page for the
                                             constituent.

                         Click this button to access the Person Profile page for the other
                                             person in the relationship or the Organization Profile page for a
                                             related organization.

Note: If an existing relationship is a *Joint* relationship, it is noted next to the Relationship link.

Relationship Academic Information

This grid displays a combined view of all degree information in the system for people who are related to
this constituent. This information includes both internal and external degrees.

Attachments

Click the View link to open the attachment in a new window.

Organization Contacts

Organization Name   Click a linked name to access the Organization Contact Detail
                                             page for the constituent.

                         Click this button to access the Organization Profile page of the
                                             organization for which the constituent is a contact.

Related Links
Maintaining Work Experience Information
Establishing Relationships

Viewing a Commitment Profile

Access the Person Profile page, Commitment Profile view.

Image: Person Profile page (3 of 4)

This example illustrates the fields and controls on the Person Profile page (3 of 4). You can find definitions for the fields and controls later on this page.

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.

Transaction Register   Click this link to access the Transaction Register page to view more giving details.

Related Links
Analyzing Donor History

Viewing a Participation Profile

Access the Person Profile page, Participation Profile view.

Image: Person Profile page (4 of 4)

This example illustrates the fields and controls on the Person Profile page (4 of 4). You can find definitions for the fields and controls later on this page.

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.
Volunteer Group and **Volunteer Sub Group**	These columns display the group or subgroup to which the volunteer belongs.

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.

Related Links

Viewing an Organization Profile

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

- View a general organization profile.

- View organization details.

- View organization financial details.

- View commitments.

- View organization participation.

Understanding Organization Profile Views

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

Data Region	*Profile View*
Location	Organization Detail
Organization Departments	Organization Detail
Organization Contacts	Organization Detail
Relationships	Organization Detail
Organization Attributes	Organization Financial Info
Organization Financial Information	Organization Financial Info
Lifetime Giving	Commitment
Historical Giving	Commitment
Matching Gifts	Commitment
Involvement	Participation
Memberships	Participation

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

Page Used to View an Organization Profile

Page Name	Definition Name	Navigation	Usage
Organization Profile	AV_ORG_PROFILE AV_ORG_PROFILE_W	• Contributor Relations > Constituent Information > Organizations > Organization Profile • Contributor Relations > Constituent Information > Workset > Workset Constituent Info > Organization Profile	View summary information about a constituent that is an organization, without having to navigate through the menus in the system.

Viewing a General Organization Profile

Access the Organization Profile page (Contributor Relations > Constituent Information > Organizations > Organization Profile). 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.

Image: Organization Profile page (1 of 5)

This example illustrates the fields and controls on the Organization Profile page (1 of 5). You can find definitions for the fields and controls later on this 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, institution, and 3Cs buttons.

Profile View   Select a profile view—*Organization Detail, Organization Financial Info, Commitment,* or *Participation*—to expand it below and populate its data regions. Click the arrowhead next to the name of the region to manually expand or collapse data regions.

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 using your browser's print functionality.
		Click the Return button to return to the Organization Profile page.
Expand All and **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 organization. Clearances are set on the Clearance page.
Prospect Manager		Displays the name of the organization'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's preferred email address.

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*
Location	No data exists.	No Locations on file
Organization Departments	No data exists.	No Organization Departments on file
Organization Contacts	No data exists.	No Organization Contacts on file
Relationships	No data exists.	No Relationships on file
Attachments	No attachments exist.	No prospect attachments on file
Organization Attributes	No data exists.	No Organization Attributes on file
Organization Financial Information	No data exists.	No Organization Financial Information on file
Lifetime Giving Historical Giving	No data exists.	Constituent is not a donor

Data Region	Condition	Message
	Data exists but user does not have access to the Giving Profile - Org page from any menu.	Constituent is a donor
Matching Gifts	No data exists.	Not a Matching Gift donor
	Data exists but user does not have access to the Giving Profile - Org page from any menu.	Constituent is a Matching Gift donor
Involvement	No data exists.	No Involvement information on file
Memberships	No data exists.	No Membership information on file
	Data exists but user does not have access to the Membership History page from any menu.	Membership information on file

The system also displays messages in this area related to the following information:

Additional Information	Condition	Message
Ratings	Data exists in the AV_PRSN_RATING_E record.	Ratings information on file
	No data exists.	No Ratings information on file
Assigned Resources	Data exists in the AV_ASGN_STAFF, AV_ASGN_VOL, or AV_ASGN_UNIT record.	Prospect resources are assigned to the constituent
	No data exists.	No Resources are assigned to the constituent

Viewing Organization Details

Access the Organization Profile page, Organization Detail view.

Image: Organization Profile page (2 of 5)

This example illustrates the fields and controls on the Organization Profile page (2 of 5). You can find definitions for the fields and controls later on this page.
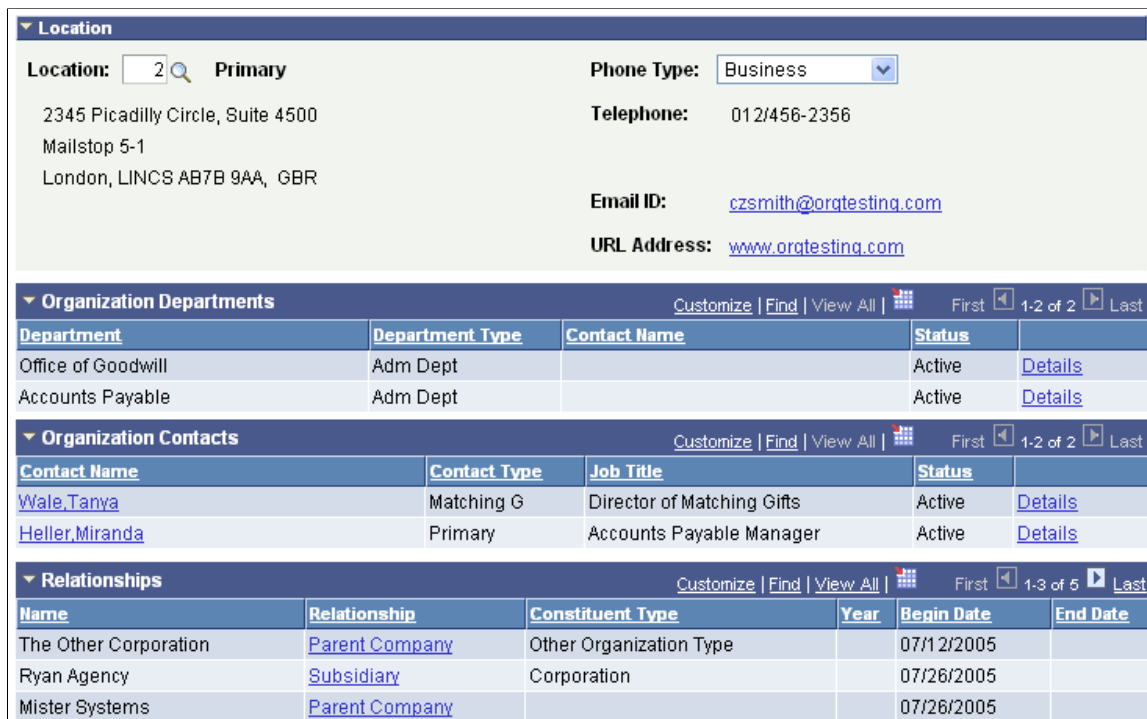
The following table lists the information sections in this view and the pages from which the system derives the information:

Information Section	Page
Location	Location Detail
Organization Departments	Department Detail
Organization Contacts	Contact Detail
Relationships	Organization Relationships Org/Person Relationships
Attachments	Constituent Attachments

Location

Location	When you select a location, the system populates the address, phone, email, and URL address information.
Phone Type	The system displays the selected phone type.
Email ID	If the organization 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.

| URL Address | If the organization has an active website address on file, it appears as a link. |

Note: The phone, email, and URL information that the system displays changes based on the location selected.

Organization Departments

| Phone | Click the link to access the Department Phone Information page. |
| Location | Click the link to access the Department Location Information page. |

Organization Contacts

| Contact Name | Click to access the Organization Contact Phone information page. |
| Location | Click the link to access the Contact Location Information page. |

Relationships

This group box displays a combination of organization-to-person and organization-to-organization relationships defined in the system.

| Relationship | Click to access the Relationship Detail page and view more details. |

Attachments

You can click the View link to open the attachment in a new window.

Related Links
Searching for Records

Viewing Organization Financial Details

Access the Organization Profile page, Organization Financial Info view.

Image: Organization Profile page (3 of 5)

This example illustrates the fields and controls on the Organization Profile page (3 of 5). You can find definitions for the fields and controls later on this page.

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

Information Section	Page
Organization Attributes	Organization Financial Information
Organization Financial Information	Organization Financial Information

Organization Attributes

Stock Exchange and **Symbol**	Displays the name of the stock exchange and the stock exchange symbol under which the organization's stock trades.
Industry Code (SIC)	Displays the Standard Industrial Code for the organization.
Employee Count and **Alumni Count**	Displays the number of people currently employed at the organization and the total number of alumni who are employees of the organization based on a system ID and a work experience record.

Organization Financial Information

Revenue Amount	Displays the total amount the organization received in revenues during the fiscal year.
Expenses Amount	Displays the total amount the organization incurred as expenses during the fiscal year.
Assets Amount	Displays the total worth of all assets held by the organization during the fiscal year.
Liability Amount	Displays the total amount of all liabilities owed by the organization during the fiscal year.

Contributions Total	Displays the total amount of all contributions made by the organization to the institution as well as other entities during the fiscal year.

Related Links

Maintaining an Organization's Financial Information

Viewing Commitments

Access the Organization Profile page, Commitment view.

Image: Organization Profile page (4 of 5)

This example illustrates the fields and controls on the Organization Profile page (4 of 5). You can find definitions for the fields and controls later on this page.

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

Information Section	Page
Lifetime Giving	Giving Profile
Historical Giving	Giving Profile
Matching Gifts	Ext Org Matching Gifts

Note: If giving profile security is active, the system may not display the Lifetime Giving or Historical Giving group boxes. Instead, the system displays messages in the Additional Information group box. The messages indicate that the organization is a donor, but they provide no giving details.

Lifetime Giving

Lifetime Commitments	Click to access the Giving Profile page for the organization.

Historical Giving

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

Transaction Register   Click to access the Transaction Register - Org page to view more giving details.

Matching Gifts

Lifetime Match   Click to access the Ext Org Matching Gifts page for the organization.

Matching Gift Rules   Click to access the Matching Rules page for the organization.

Related Links

Analyzing Donor History

Viewing Organization Participation

Access the Organization Profile page, Participation view.

Image: Organization Profile page (5 of 5)

This example illustrates the fields and controls on the Organization Profile page (5 of 5). You can find definitions for the fields and controls later on this page.

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
Memberships	Membership History Org (membership history organization)

Involvement

Involvement	Click a link to access the Involvement Detail page for the organization.

Memberships

Membership Organization	Click a link to access the Membership Detail page for the organization.
	Note: If business unit security is active, the system only displays member organizations for accessible business units.

Related Links

Understanding Membership

Viewing a Prospect Profile

Contributor Relations provides a Prospect Profile page that presents a 360-degree view of a prospect's connections with your institution. The page contains a large amount of information as well as links to other pages in the system to enable you to find more detailed information. The data regions available on the page change, depending on whether the prospect is a person or an organization.

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

• View a general prospect profile.

• View prospect management details.

• View prospect philanthropic interests.

Note: If prospect management security is active, the system may not display this page at all. Instead, the system displays messages in the Additional Information group box at the bottom of the Person Profile or Organization Profile page. These messages provide information about the amount and type of prospect information in the system, but reveal no details.

Understanding Prospect Profile Views

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

Data Region	*Profile View*
Assigned Resources	Prospect Management
Clearances	Prospect Management
Strategies	Prospect Management

Data Region	Profile View
Recent Actions	Prospect Management
Next Actions	Prospect Management
Ratings	Prospect Management
Charitable Involvement	Philanthropic Interests
Designations Supported	Philanthropic Interests
Personal Assets	Prospect Management (people only)
Planned Giving	Philanthropic Interests (people only)

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

Page Used to View a Prospect Profile

Page Name	Definition Name	Navigation	Usage
Prospect Profile	AV_PROSPROF_P, AV _PROSPROF_E, AV_ PROSPROF_W, AV_ PROSPROF_WE	• Contributor Relations > Constituent Information > Organizations > Organization Profile > Prospect Profile • Contributor Relations > Constituent Information > Workset > Workset Constituent Info > Organization Profile > Prospect Profile • Contributor Relations > Constituent Information > People > Person Profile > Prospect Profile • Self Service > Outreach > View Person Information > Constituent Information > Person Profile > Prospect Profile	View summary information about a prospect without having to navigate through the menus in the system.

Viewing a General Prospect Profile

Access the Prospect Profile page (Contributor Relations > Constituent Information > Organizations > Organization Profile > Prospect Profile). 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.

Image: Prospect Profile page (1 of 3)

This example illustrates the fields and controls on the Prospect Profile page (1 of 3). You can find definitions for the fields and controls later on this 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 (for people), institution, spouse button (for people, if a spousal relationship exists), and 3Cs/Service Indicator buttons.

Constituent Type	Click to access the Constituent Type Summary page for a person. It lists all types assigned to a constituent.
Year	If academic information exists for the person 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 prospect, then None appears here as a link. Click the link to access the Academic Information inquiry component.
FERPA (Family Educational Rights and Privacy Act)	Click to access the FERPA display component for the person. It lists the prospect's personal data and specifies which information can be released.
Profile View	Select a profile view–*Prospect Management* or *Philanthropic Interests*–to expand it and populate its data regions. Click the arrow next to the region's name to manually expand or collapse data regions.
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 using your browser's print functionality.
	Note: Set narrow print margins for your printer.
	Click the *Return* button to return to the Prospect Profile page.

Expand All and **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 prospect. You set clearances on the Clearance page.
Prospect Manager	Displays the name of the prospect manager assigned to the constituent. 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*
Assigned Resources	No data exists.	No resources are assigned to the constituent
Clearances	No data exists.	No current Clearances for this constituent
Strategies	No data exists.	No current Strategies for this constituent
Attachments	No attachments exist.	No prospect attachments on file
Recent Actions	No data exists.	No actions for this constituent have occurred in the last year
Next Actions	No data exists.	No future actions are scheduled for this constituent
Ratings	No data exists.	No Ratings information on file
Charitable Involvement	No data exists.	No Charitable Involvement information on file
Designations Supported	No data exists.	Constituent is not a donor
Personal Assets	No data exists.	No Personal Assets on file
Planned Giving	No data exists.	No Planned Giving information on file

Related Links

"Understanding FERPA Privacy Control" (PeopleSoft Campus Solutions 9.2: Campus Community)

Viewing Prospect Management Details

Access the Prospect Profile page, Prospect Management view. The system does not display the Personal Assets section for organizations.

Image: Prospect Profile page (2 of 3)

This example illustrates the fields and controls on the Prospect Profile page (2 of 3). You can find definitions for the fields and controls later on this page.

For person records, the Personal Assets grid appears in the Prospect Management view.

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

Information Section	Page
Assigned Resources	Prospect Assignments
Clearances	Clearance
Strategies	Strategy Summary
Recent Actions	Action Summary
Next Actions	Action Summary
Ratings	Ratings Summary
Personal Assets	Personal Assets

Assigned Resources

This group box displays current and future assignments.

Role	Click to access the Assignment Detail page.
Spouse	If this check box is selected, the prospect and spouse are linked and the same resources are assigned to them.
	This check box appears only for prospects that are people.

Clearances

Detail	Click to access the Clearance page to view more details.

Strategies

Strategy Name	Click to access the Prospect Strategy Detail page.
Spouse Link	If this check box is selected, a linked strategy exists for a spouse in the system.
Linked Actions	Click to access the Strategy Linked Actions page.

Recent Actions

This group box displays actions completed within the last year.

Action Description	Click to access the Action Detail page.

Next Actions

This group box displays incomplete actions scheduled in the past year as well as those with a planned date greater than today's date.

Action Description	Click to access the Action Detail page.

Ratings

Rating Category	Click to access the Ratings Detail page to view more ratings information.

Personal Assets

This group box appears only for prospects that are people.

Description	Click to access the Personal Asset Detail page for the prospect.

Related Links

Understanding Prospect Management

Viewing Prospect Philanthropic Interests

Access the Prospect Profile page, Philanthropic Interests view. The system does not display the Planned Gifts section for organizations.

Image: Prospect Profile page (3 of 3)

This example illustrates the fields and controls on the Prospect Profile page (3 of 3). You can find definitions for the fields and controls later on this page.

Charitable Involvement		Customize | Find | View All | First ◄ 1-2 of 2 ► Last			
Type	**Involvement**	**Start Date**	**End Date**	**Source**	
Award/Honor	United Way				
Interest	College of Bus. Coop Program	09/04/2006			

Designations Supported			Customize | Find | View All | First ◄ 1-2 of 2 ► Last			
Des BU	**Designation Name**	**Giving Credits**	**Recognition Credits**	**1st Gift Date**	**Last Gift Date**	**Count**
PSUNV	Business Dean's Fund	13,060.00 USD	0.00 USD	09/10/2001	09/10/2006	5
PSUNV	Capital Campaign 2000 Fund	6,000.00 USD	0.00 USD	09/10/2006	09/10/2006	1

Additional Information
No additional profile information available

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

Information Section	*Page*
Charitable Involvement	Philanthropic Interests
Designations Supported	Philanthropic Interests
Planned Gifts	Planned Giving Summary

Charitable Involvement

This group box displays all details about any charitable activities, interests, affiliations, honors/awards, or other involvement for the prospect.

Designations Supported

This group box displays a sum of all gifts to a designation. This summary provides a picture of a prospect's giving trends.

Designation Name   Click to access the Account Details page for the designation.

Planned Gifts

This group box appears only for prospects that are people.

Planned Gift Name	Click to access the Bequest, Trust, Gift Annuity, or Pooled Income Fund Detail page for the prospect, depending on the type of planned gift that is selected.

Related Links
Searching for Records

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.

Related Links
Updating or Adding a Constituent Who is a Person
Updating or Adding a Constituent Who is an Organization

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	*Definition Name*	*Navigation*	*Usage*
Audience History	AV_AUD_HISTORY AV_AUD_HISTORY_E	• Contributor Relations > Constituent Information > People > Participation > Audience History • Contributor Relations > Constituent Information > 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 (Contributor Relations > Constituent Information > People > Participation > Audience History).

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	*Definition Name*	*Navigation*	*Usage*
Involvement	AV_INVLV AV_INVLV_E AV_INVLV_W	• Contributor Relations > Constituent Information > People > Biographic Information > Involvement • Contributor Relations > Constituent Information > Organizations > Participation > Involvement • Contributor Relations > Constituent Information > Workset > Involvement	Add new involvement records for a constituent.

Page Name	*Definition 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 > 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 > 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.

Page Name	Definition Name	Navigation	Usage
Involvement Detail	AV_INVLV_DTL_SP	• You can access the Involvement Detail page through multiple navigation paths. The most frequently used path follows: • Click the Detail link on the Involvement Summary page.	View additional information about an involvement record.
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 constituents with an interest in golfing.
Roster List	AV_I_INVLV_SMRY	Contributor Relations > CR Reports > Involvement Roster > Roster List	View a list of 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 (Contributor Relations > Constituent Information > People > Biographic Information > Involvement).

Image: Involvement page

This example illustrates the fields and controls on the Involvement page. You can find definitions for the fields and controls later on this page.

Involvement Type	Select an involvement type, such as a constituent's interest, activities, awards, or affiliations. Its description appears to the right.
Involvement Category	Select a category of involvement information such as professional, charitable, academic, social, religious, and so on. The category's description appears to the right.
Involvement	Select an involvement code from the available options, which are defined by your institution. The code's description appears to the right.
Institution	Indicate with which institution the involvement is associated.
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 Modified Date	The date on which this information was most recently updated.

Filtering Involvement Records

Access the Involvement Filter page (Contributor Relations > Constituent Information > People > View Person Information > Participation > Involvement Summary > Involvement Filter).

Image: Involvement Filter page

This example illustrates the fields and controls on the Involvement Filter page. You can find definitions for the fields and controls later on this page.
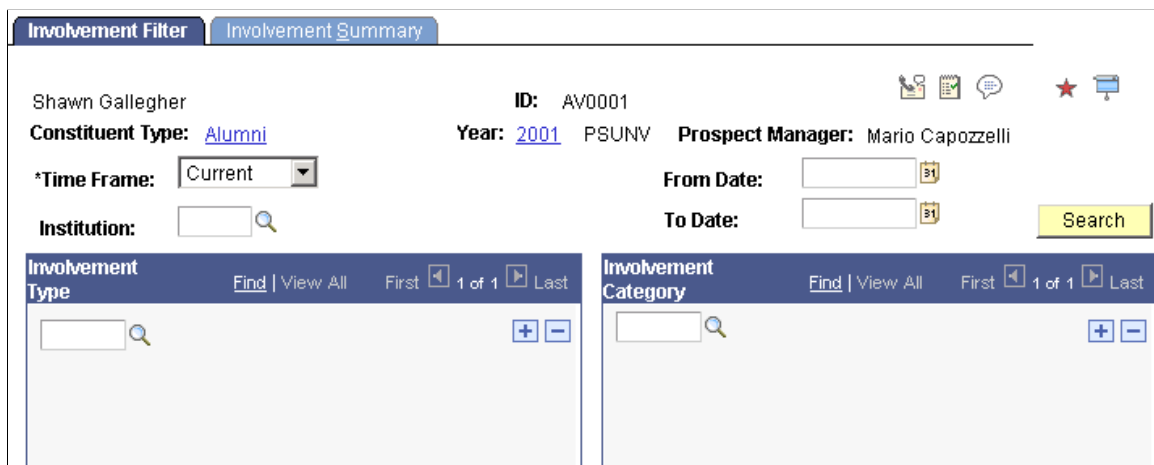
Institution	Select the institution for which you want to view involvement information.

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 (Contributor Relations > CR Reports > Involvement Roster > Roster Filter).

Image: Roster Filter page

This example illustrates the fields and controls on the Roster Filter page. You can find definitions for the fields and controls later on this page.

Involvement Type	Select the involvement type for which you want to create a roster. Its description appears to the right.
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. The description of the category appears to the right.
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. The description of the code appears to the right.

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.

Related Links

Building a Workset From a Page in the System

Establishing Relationships

This section provides an overview of relationships, lists common elements, 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	Definition Name	Navigation	Usage
Relationships	AV_RELATIONSHIPS_E	Contributor Relations > Constituent Information > 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 / Org Relationships (person to organization 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.
Org / Person Relationships (organization to person relationships)	AV_RELATION_EP	Contributor Relations > Constituent Information > 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.
Address Information	AV_REL_ADDR_SEC	Click the Address button on the Relationship Detail page.	View existing address information for people or organizations in the system with a relationship assigned. The system displays address information stored on the ADDRESSES table, for both the primary ID and the related ID.

Page Name	Definition Name	Navigation	Usage
Org Relationship Summary (organization relationship summary)	AV_ORG_RELATION AV_ORG_RELATION_W	• Contributor Relations > Constituent Information > 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.

Related Links

"Managing Relationships Data" (PeopleSoft Campus Solutions 9.2: Campus Community)

Establishing an Organization-to-Organization Relationship

Access the Relationships page (Contributor Relations > Constituent Information > Organizations > Relationships > Org to Org Relationships).

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.

Formal Description   Click this link to enter the formal long name of the organization.

Note: If you have selected a Related ID that has had a Formal Description added on the Organization Table page, it appears when you select the link. If you have not selected a Related ID, you can enter a formal long name for the organization that is being related.

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

Related Links

"Managing Addresses and Phone Data" (PeopleSoft Campus Solutions 9.2: Campus Community)

Establishing a Person-to-Organization Relationship

Access the Person / Org Relationships page (Contributor Relations > People > Relationships > Person to Org Relationships).

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.
Formal Description	Click this link to enter the formal long name of the organization.

> **Note:** If you have selected a Related ID that has had a Formal Description added on the Organization Table page, it appears when you select the link. If you have not selected a Related ID, you can enter a formal long name for the organization that is being related.

Establishing an Organization-to-Person Relationship

Access the Org / Person Relationships page (Contributor Relations > Constituent Information > Organizations > Relationships > Org to Person Relationships).

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

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 set them up and assign them to roles at your institution.

See Adding Resources.

Prospect Management

To manage prospects effectively, you must 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 a 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

You can assign prospects to resources in two ways:

- Create *mass* assignments, whereby you assign a group of prospects to a particular resource and role.

- Create *individual* assignments, whereby you assign a single prospect to a resource.

This section lists common elements and discusses how to:

- Create mass assignments.

- Create individual staff assignments.

- Create individual volunteer assignments.

- Create individual unit assignments.

- View the prospects assigned to a resource.

- 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 affected 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	Definition 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.
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.

Page Name	Definition Name	Navigation	Usage
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.
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.

Page Name	Definition Name	Navigation	Usage
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.
Assignment Detail	AV_ASGN_INQ_DTL_SP	• You can access the Assignment Detail page through multiple navigation paths. The most frequently used paths are: • Click the Detail button on the Resource Assignments page. • Click the Detail button on the Prospect Assignments page.	View additional information about an assignment.

Page Name	Definition Name	Navigation	Usage
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 (Contributor Relations > Prospect Management > Prospect Resources > Mass Assignments > Mass Staff Assignments). The Mass Assign Staff page is shown; the appearance of the other pages will differ somewhat.

Image: Mass Assign Staff page

This example illustrates the fields and controls on the Mass Assign Staff page. You can find definitions for the fields and controls later on this page.

This page enables you to assign a group of prospects to a resource for the same reason. When you create mass assignments, the system:

• Generates an assignment record for each prospect in the group.

• Adds each prospect into the resource's MYPROS workset.

See "Creating and Maintaining the My Prospects Workset" (PeopleSoft Campus Solutions 9.2: Self Service).

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, or **Unit ID**	Enter the ID of the resource for which you are creating mass assignments. Select a staff ID, a volunteer ID, or a unit ID, depending on the resource type for which you are creating assignments.
Role	The values that you selected in the Assignment Role Option group box of the CR Installation page affect the IDs that are 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, 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 person's 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 (Contributor Relations > Prospect Management > Prospect Resources > Assign Prospect Resources > Staff Assignment).

Image: Staff Assignment page

This example illustrates the fields and controls on the Staff Assignment page. You can find definitions for the fields and controls later on this page.

Staff ID, Volunteer ID, or Unit	Depending on which page you access, enter the staff ID, the volunteer ID, or the 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 it is not included in the assignment totals for 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 does not copy the assignment.

Creating Individual Volunteer Assignments

Access the Volunteer Assignment page (Contributor Relations > Prospect Management > Prospect Resources > Assign Prospect Resources > Volunteer Assignment).

Image: Volunteer Assignment page

This example illustrates the fields and controls on the Volunteer Assignment page. You can find definitions for the fields and controls later on this 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.

Related Links
Creating Individual Staff Assignments

Creating Individual Unit Assignments

Access the Unit Assignment page (Contributor Relations > Prospect Management > Prospect Resources > Assign Prospect Resources > Unit Assignment).

Image: Unit Assignment page

This example illustrates the fields and controls on the Unit Assignment page. You can find definitions for the fields and controls later on this 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.

Related Links
Creating Individual Staff Assignments

Viewing the Prospects Assigned to a Resource

Access the Resource Filter page (Contributor Relations > Prospect Management > Prospect Resources > Resource Assignments > Resource Filter).

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 for. 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, or **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. Click the prompt to access the Lookup Staff ID search page, where you can search for resources of the selected type that have prospect assignments.

Use the search keys and wildcards to narrow the list of returned staff members on the Resource Assignments page.

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 (Contributor Relations > Prospect Management > Prospect Resources > Resource Assignments > Resource Assignments).

Assigned Prospect   Displays the name of the donor prospect for which a resource assignment exists.

Assigned Resource   Displays the name of the staff member, volunteer, or unit assigned to the prospect.

Role   Displays 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.

Related Links
Building a Workset From a Page in the System

Generating the Role Assignments Report

Access the Role Assignments page (Contributor Relations > CR Reports > Role Assignments).

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 that appears on the report. You can sort by *Count, ID,* or *Name.*
	If you select Count, the Role Assignments report orders the staff IDs by the highest number of assignments.
	If you select ID, the report lists the staff by their ID numbers.
	If you select Name, the report lists the staff in alphabetical order.

Note: The values in the Sort By and Sort Order fields 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.
	Descending order means that the values in the Sort By field are sorted from highest value to lowest value. Ascending order means that the values are sorted from lowest value to highest value.
Report Type	Select the type of report to generate.
	Select *Summary* to produce 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.
	Select *Detail* to produce a one-page summary and a separate page for each resource. The separate page includes the ID and name of each prospect assigned, the associated campaign, start date, end date, and whether the spouse's record is linked.

Related Links
Contributor Relations Reports: Selected Reports

Creating Resource Goals

This section discusses how to create goals for a prospect resource.

Page Used to Create Resource Goals

Page Name	Definition Name	Navigation	Usage
Prospect Resource Goals	AV_PRS_RESO_GLS	Contributor Relations > Prospect Management > Prospect Resources > Prospect Resource Goals	Create a set of goals for a prospect resource to be used in custom reports.

Creating Goals for a Prospect Resource

Access the Prospect Resource Goals page (Contributor Relations > Prospect Management > Prospect Resources > Prospect Resource Goals).

Image: Prospect Resource Goals page

This example illustrates the fields and controls on the Prospect Resource Goals page. You can find definitions for the fields and controls later on this page.

Enter the Institution if necessary. Select the Assignment Type (*Staff, Volunteer,* or *Unit*) for which you want to create goals. Select the person or unit that will be responsible for accomplishing the goals. Enter the fiscal year during which the goals are to be accomplished.

Assignment Type   Indicates whether the goal applies to a staff member, a volunteer, or a CR Unit.

Fiscal Year   The fiscal year to which the goal applies.

Responsible   Indicates the person or unit to which the goal pertains.

Start Date   Enter the date on which the efforts toward the goal begin.

End Date   Enter the date on which the efforts toward the goal end.

> **Note:** The start and end dates can reflect interim periods within a fiscal year. For example, goals might be set on a quarterly basis.

Goal Type   Select the type of goal as defined on the Goal Type Table. This is a required field for all rows entered in the grid.

Initiative Type	Select the type of initiative to which the goal applies. This field is required if you want to tie the goal to a specific campaign. Otherwise, it is optional.
Initiative	Enter the specific initiative to which the goal applies. This field is required if an Initiative Type has been selected. Otherwise, it is optional.
Overall Status	The phase at which the prospects are in the cultivation cycle. For example, you may have a different goal for constituents at the Prospect level than you might have for constituents at a more advanced stage of the cultivation cycle. This field is optional.
Amount	The financial amount of the goal. This field is required if the Goal Type has been set up as an Amount-based field.
Percent	The percent expected to meet the goal. This field is required if the Goal Type has been set up as a Percent-based field.
Number	The number expected to be reached to accomplish the goal. This field is required if the Goal Type has been set up as a Number-based field.
Target End Date	A targeted end date that may be before the end of the fiscal year.

Creating Prospect Strategies

This section provides an overview of prospect strategies and discusses how to:

- Create an overall prospect status.

- View a prospect status history.

- Create an overall cultivation strategy.

- View actions linked to a strategy.

- View a strategy summary.

- View prospect strategy details.

Understanding 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.

Pages Used to Create Prospect Strategies

Page Name	Definition Name	Navigation	Usage
Prospect Status	AV_PRSP_STATUS AV_PRSP_STATUS_E AV_PRSP_STATUS_W	• Contributor Relations > Prospect Management > Stewardship Plans > Prospect Strategy > Prospect Status - Person • Contributor Relations > Prospect Management > Stewardship Plans > Prospect Strategy > Prospect Status - Organization • Contributor Relations > Prospect Management > Stewardship Plans > Prospect Strategy > Prospect Status - Workset	Create an overall prospect status for a prospect.
Prospect Status History	AV_PRSP_HIST AV_PRSP_HIST_E AV_PRSP_HIST_W	• Contributor Relations > Prospect Management > Stewardship Plans > Prospect Strategy > Prospect Status History - Pers • Contributor Relations > Prospect Management > Stewardship Plans > Prospect Strategy > Prospect Status - Org • Contributor Relations > Prospect Management > Stewardship Plans > Prospect Strategy > Prospect Status - Work	View the history of a prospect's overall status.

Page Name	Definition 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.

Page Name	Definition Name	Navigation	Usage
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.
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 an Overall Prospect Status

Access the Prospect Status page (Contributor Relations > Prospect Management > Stewardship Plans > Prospect Strategy > Prospect Status).

Overall Status	Select the status of cultivation in which the prospect is currently involved. Delivered values include *Active, In Negotiation, Prospect, Suspect,* and *Ultimate Gift*. Values for this field are translate values. You can modify these translate values.
Comment	Enter a note indicating related information about the prospect status assignment.
Last Update Date/Time and **Last Updated By**	Displays when the prospect status was added or updated, and the name of the person who made the assignment in the database.

Viewing a Prospect Status History

Access the Prospect Status History page (Contributor Relations > Prospect Management > Stewardship Plans > Prospect Strategy > Prospect Status History).

The history of the prospect's status includes all effective-dated rows so users can follow the progress of a prospect through the cultivation cycle.

Creating an Overall Cultivation Strategy

Access the Prospect Strategy page (Contributor Relations > Prospect Management > Stewardship Plans > Prospect Strategy > Strategy - Person > Prospect Strategy).

Image: Prospect Strategy page

This example illustrates the fields and controls on the Prospect Strategy page. You can find definitions for the fields and controls later on this page.
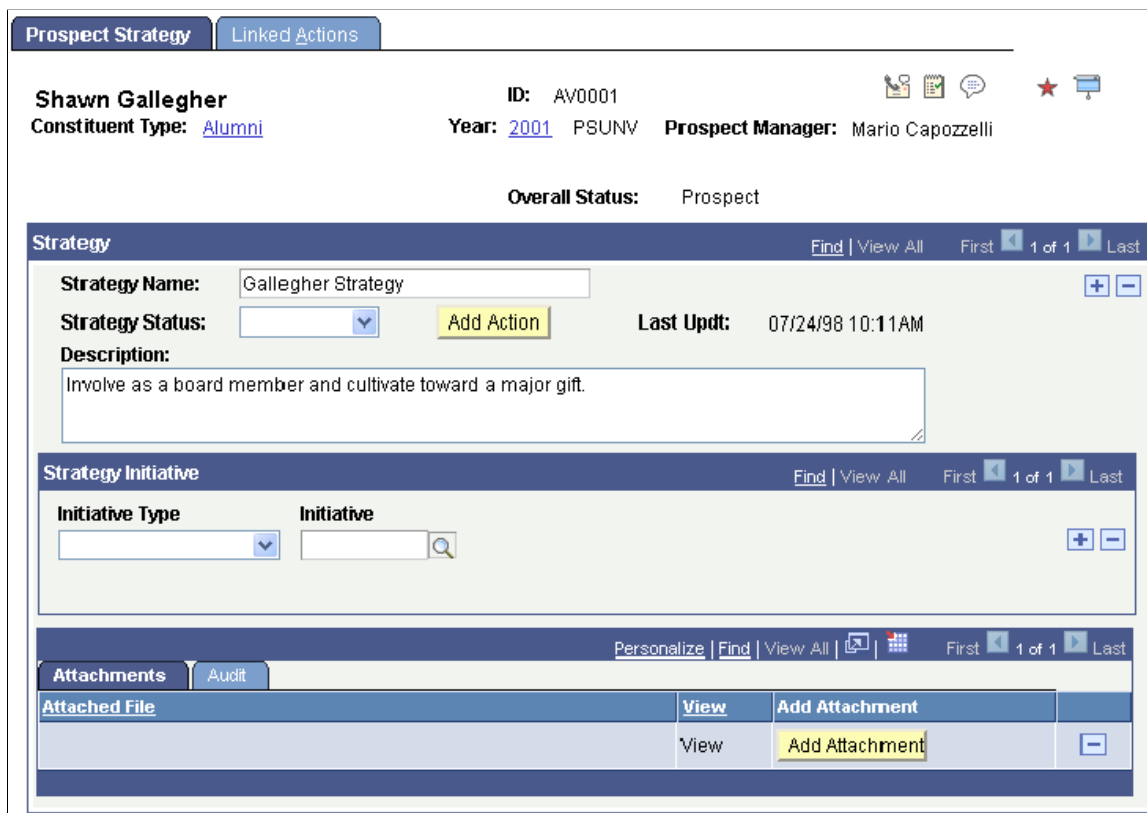
| Overall Status | Displays the status of cultivation in which the prospect is currently involved. Values include *Active, In Negotiation, Prospect, Suspect,* and *Ultimate Gift.* Values for this field are delivered with the system as translate values. You can modify these translate values. |

Overall Status   Displays 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   Select 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 to one record 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.

Related Links

Creating Actions for Individual Prospects

Viewing Actions Linked to a Strategy

Access the Linked Actions page (Contributor Relations > Prospect Management > Stewardship Plans > Prospect Strategy > Strategy - Person > Linked Actions).

Image: Linked Actions page

This example illustrates the fields and controls on the Linked Actions page. You can find definitions for the fields and controls later on this page.
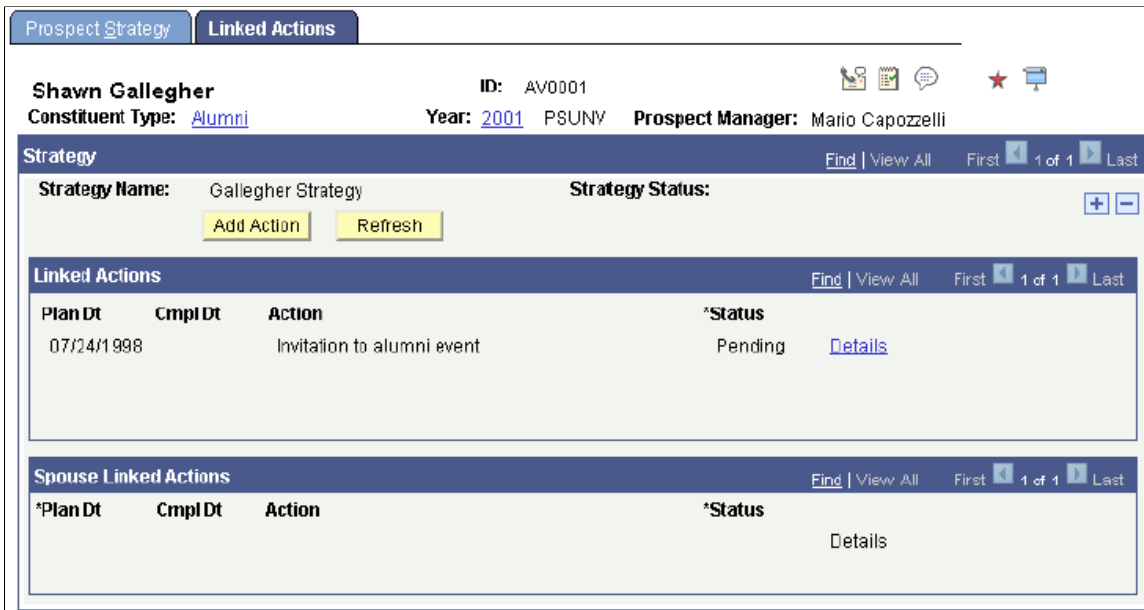
Both the actions for the prospect and the actions for the prospect's spouse appear on this page when the action is linked to the strategy.

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.

Related Links
Creating Actions for Individual Prospects

Viewing a Strategy Summary

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

Related Links
Creating an Overall Cultivation Strategy

Viewing Prospect Strategy Details

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

Related Links
Creating an Overall Cultivation Strategy

Tracking Prospect Data

You can maintain information about a prospect's ratings, personal assets, and philanthropic interests.

This section lists a common element and discusses how to:

- Maintain personal assets.

- View personal assets.

- Maintain ratings.

- Filter ratings.

- View ratings.

- View a prospect's philanthropic interests.

- Prepare and generate a biographic profile report.

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	Definition 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.

Page Name	Definition Name	Navigation	Usage
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. One frequently used path is: • 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, 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.
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 Filter	AV_RATNG_FILTR_P	Contributor Relations > Prospect Management > Giving Capacity > Rating Summary > Ratings Filter	Search for ratings information that meets the criteria you select, such as household income, gift capacity, and so on, for a prospect.

Page Name	Definition Name	Navigation	Usage
Rating 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 ratings that meet the criteria you selected on the Ratings Filter page.
Ratings Detail	AV_PRSN_RATE_SP	Click the Details link on the Ratings Summary page.	View 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.

Creating a Biographic Narrative

Access the Narrative page (Contributor Relations > CR Reports > Biographic Reports > Biographic Profile > Narrative).

If you are preparing a biographic profile, enter a narrative about the constituent. The Narrative field should contain information that is more descriptive than information in the summary area on the Biographic Profile page. This field might be used by a president to detail a personal request or to provide a more detailed history of the constituent.

Maintaining Personal Assets

Access the Personal Assets page (Contributor Relations > Prospect Management > Prospect Research > Personal Assets).

Image: Personal Assets page

This example illustrates the fields and controls on the Personal Assets page. You can find definitions for the fields and controls later on this page.
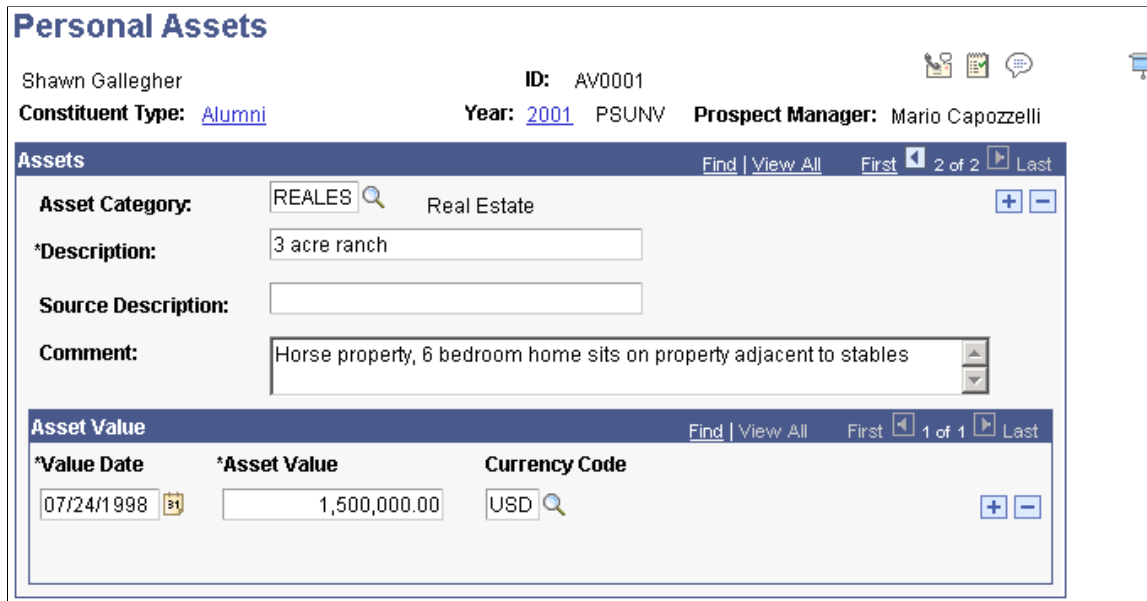
This page enables you to maintain specific asset information associated with a constituent.

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.
Currency Code	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 (Contributor Relations > Prospect Management > Giving Capacity > Personal Asset Summary).

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

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

Related Links

Maintaining Personal Assets

Maintaining Ratings

Access the Ratings page (Contributor Relations > Prospect Management > Prospect Research > Ratings).

Image: Ratings page

This example illustrates the fields and controls on the Ratings page. You can find definitions for the fields and controls later on this 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 linked to a specific rating category. Indicators are defined on the Rating Indicators page. If the code requires additional values, the Value field appears.
Valid	Select a value that refines the indicator code to a more specific rating if the rating indicator requires it.
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. |
Initiative Code	The campaign initiative to which the rating applies. This code allows ratings to be created independently for separate campaigns for the same prospect, for example.
Source	Enter the name of the person, vendor, or publication providing rating information to your institution. This field can be 60 characters long.
	Click to spell check any comments you add to this page.

Filtering Ratings

Access the Rating Filter page (Contributor Relations > Prospect Management > Giving Capacity > Rating Summary > Ratings Filter).

Image: Rating Filter page

This example illustrates the fields and controls on the Rating Filter page. You can find definitions for the fields and controls later on this page.

Note: The prompts on this page return only those values from existing ratings for this constituent.

Rating Type	This field returns the value *All* or any ratings types that occur on a rating for this prospect. Examples of rating types are *Peer, Staff,* and *Vendor.*
Rating Indicators	If you select *Specific,* the fields in the Indicators region appear, allowing you to select ratings indicators for the filter. If you select *All,* the region is hidden and all ratings indicators appear in the results.
Rating Category	Rating categories that apply to this constituent may be used as filter criteria. Examples of rating categories include charitable, academic, or survey.
Indicators	To limit the ratings listed in the Ratings Summary, you can filter by specific ratings indicators. Only those ratings indicators that have been applied to the prospect appear in the prompt. If you do not select a value, all ratings indicators that meet the remainder of the filter criteria appear in the results.
Rating Date and **Potential Date**	Enter dates to narrow the search results that the system retrieves.
Amount	Enter values in the From and To fields to narrow the search results that the system retrieves.
Ratings Source	Enter values in the *Begins With, Contains, Ends With,* or *Exact Match* fields to search for ratings source information.

Current, Historical, and **All**	The system retrieves results that meet the effective date criteria you select.
	Current: Only current effective-dated rows appear.
	Historical: Only rows with an effective date less than today appear.
	All: All rows, regardless of date, appear.
Search	Click to return results that meet your criteria. You can view these results on the Rating Summary page.

Viewing Ratings

Access the Rating Summary page (Contributor Relations > Prospect Management > Giving Capacity > Rating Summary).

The Ratings Information 1 tab displays summarized ratings information such as rating date, type, category, and indicator.

The Ratings Information 2 tab displays ratings information such as potential date and source. The rating date and rating indicator carry over from the Ratings Information 1 tab. Click the Comments link to view comments related to the rating.

Related Links
Maintaining Ratings

Viewing a Prospect's Philanthropic Interests

The Philanthropic Interests page gives a historical view of a constituent's past philanthropy (whether or not it is with your institution). This view helps your institution view patterns of philanthropy for this constituent in the past to better target this person in the future.

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

Designation

This group box lists each designation, its business unit, and the total giving credits or hard credit gifts associated with it. The Recognition Credits column lists all soft credits for the designation. The system lists the dates of the first and most recent gifts to the designation, as well as the number of gifts that the prospect has made to the designation.

Related Links
Adding Involvement Records

Implementing a Prospect Plan

This section provides an overview of prospect plans and discusses how to:

• Clear a prospect for cultivation.

• Create mass actions.

• Create actions for individual prospects.

• Enter action results.

• 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.

Understanding Prospect Plans

After you create an overall strategy, you can determine the steps or actions that you plan to take to complete the strategy. You can create multiple actions, such as dinners, phone calls, and solicitations, for a prospect.

You can create actions in two ways: mass actions, for which you create one action and assign it to multiple prospects, or individual actions, for which 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, which is 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 track all the actions they're handling. The system provides a personalized *to do list* that lists all the actions on which you are working.

Pages Used to Implement a Prospect Plan

Page Name	Definition 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	AV_MASS_ACTN	• Contributor Relations > Prospect Management > Stewardship Plans > Constituent Actions > Mass Actions • Contributor Relations > Prospect Management > Stewardship Plans > Constituent Actions > Mass Actions - Workset	Create an action for multiple prospects at one time.
Mass Action Completion	AV_MASS_ACTN_CMPSP	Click the Complete action link on the Mass Actions page.	Complete a mass action.
Prospect Action	AV_CNST_ACTN AV_CNST_ACTN_E	• Contributor Relations > Prospect Management > Stewardship Plans > Constituent Actions > Actions - Person > Prospect Action • Contributor Relations > Prospect Management > Stewardship Plans > Constituent Actions > Actions - Org > Prospect Action	Enter information about the action that you are creating.
Action Results	AV_CNST_ACTN2 AV_CNST_ACTN2_E	• Contributor Relations > Prospect Management > Stewardship Plans > Constituent Actions > Actions - Person > Action Results • Contributor Relations > Prospect Management > Stewardship Plans > Constituent Actions > Actions - Org > Action Results	Complete an action and record its results, including a contact report or a report detailing the results of a particular action.

Page Name	Definition Name	Navigation	Usage
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.
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.

Page Name	Definition Name	Navigation	Usage
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	Search for specific actions pertinent to the constituent in context based on selection criteria.
Action List	AV_CNST_ACTN_LIST	• Contributor Relations > Prospect Management > Stewardship Plans > Constituent Actions > Action List - Person • Contributor Relations > Prospect Management > Stewardship Plans > Constituent Actions > Action List - Organization • Contributor Relations > Prospect Management > Stewardship Plans > Constituent Actions > Action List - Worklist	Add, edit, and delete constituent actions, regardless of their status.

Page Name	Definition 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 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. This one is used frequently: • Select an Action link on the Action Summary page.	View additional information about an action.
Ask Detail	AV_ACTN_ASK_SP	Click the Ask Information button on the Action Detail page.	View specific details 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	Definition 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, and 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 prospect initiative.

Clearing a Prospect for Cultivation

Access the Clearance page (Contributor Relations > Prospect Management > Stewardship Plans > Clearances > Clearance).

Clearance Required   Select to indicate that the constituent must be cleared before he or she can be selected as a volunteer or prospect for an initiative.

Prospect Manager   Displays the name of the person who is responsible for managing the institution contacts with this 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 for that constituent.

Creating Mass Actions

Access the Mass Actions page (Contributor Relations > Prospect Management > Stewardship Plans > Constituent Actions > Mass Actions).

Image: Mass Actions page (1 of 2)

This example illustrates the fields and controls on the Mass Actions page (1 of 2). You can find definitions for the fields and controls later on this page.

Image: Mass Actions page (2 of 2)

This example illustrates the fields and controls on the Mass Actions page (2 of 2). You can find definitions for the fields and controls later on this page.

After entering all of the mass action information, click the Process Actions button at the bottom of the page to apply the action. The system displays a Message Catalog message (14300,100) that identifies how many people and organization constituent action records were added.

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.
Description	Enter a description for the action.
Planned Date	Enter the date when the action is planned to occur. The default is today's date.
Expiration Date	Enter the date after which the action is considered to be expired.
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 amount in the Ask From field.
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.

Solicitor and **Solicitor ID**	If the action type you selected is *Ask,* you must select the type of resource that carries out the task and then select the solicitor's ID. Options include all the resources that are assigned the role of solicitor.
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 from the values *Staff, Unit,* and *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 that appears in the Resource Assigned field.
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.
Role	Specify a role for other resources assigned to a mass action. When you select this role, the system populates the Role field on the Action Info page of the constituent action.

Initiatives

Enter Initiative Type and Initiative Code information associated with the action. The Initiatives group box behaves the same as constituent actions. Separate grids enable you to assign people and organizations to an action. Click the Add button to indicate how many new ID rows you want to add to the grid at one time, which facilitates quicker data entry.

Linked Constituents

In Mass Actions – Workset, you can select a Workset Code and selectively delete members of that workset if the action to be created does not apply.

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 field 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.

To complete a mass action:

1. Enter any information that you want to capture about the completed action.

   The result code is a required field. The user's ID is the default for the Author ID field. Today's date is the default for the Complete Date and Report Date fields.

   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.

2. Click OK.

3. Save the page.

4. On the Mass Actions 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 PeopleSoft Outreach).

Creating Actions for Individual Prospects

Access the Prospect Action page (Contributor Relations > Prospect Management > Stewardship Plans > Constituent Actions > Actions - Person > Prospect Action).

Image: Prospect Action page (1 of 2)

This example illustrates the fields and controls on the Prospect Action page (1 of 2). You can find definitions for the fields and controls later on this page.

Image: Prospect Action page (2 of 2)

This example illustrates the fields and controls on the Prospect Action page (2 of 2). You can find definitions for the fields and controls later on this page.

Actions are the individual contacts that you have with a prospect throughout the cultivation process.

Prospect Manager	When using mass actions, the system displays the constituent's prospect manager, if one is assigned to the prospect in the system, at the time the action is created. This information appears on the Prospect Action page of the Actions and Actions-Org components.

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.
Action	Enter a description (up to 100 characters) of the action.
Description	Enter descriptive information (up to 254 characters) about the purpose and goal of the action.
Strategy	Select a prospect strategy to associate with the action. Selecting a strategy ties this action to a particular prospect strategy.
Planned Date	Enter the date on which the action is scheduled to occur. Today's date is the default.
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, then you are required to enter this information for the Contact Report when an action is complete.
Action Type	Select the classification, such as *Ask, Dinner,* or *Phone Call,* for the action. Action types are defined on the Action Types page.
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.
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.
Assignment Type and **Responsible**	Select the type of resource that carries out the task, and 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.

Others Assigned

If you assign a staff resource in this area, the system adds the action to the staff member's to do list. If a person is assigned to this action through mass actions, the system populates that information here, along with the person's role.

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.

Initiatives

Initiative Type and **Initiative Code**	Enter the initiative type and the initiative code to relate to the action.

Ask Information

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 and then enter the solicitor's ID. Values include the resources that are assigned to the role of solicitor.

Attachments

Click the View link to open the attachment in a new window. Click the Add Attachment button to upload a new attachment from within the component.

Related Links

Creating Prospect Strategies

Implementing a Prospect Plan

Entering Action Results

Access the Action Results page (Contributor Relations > Prospect Management > Stewardship Plans > Constituent Actions > Actions - Person > Action Results).

Image: Action Results page

This example illustrates the fields and controls on the Action Results page. You can find definitions for the fields and controls later on this page.
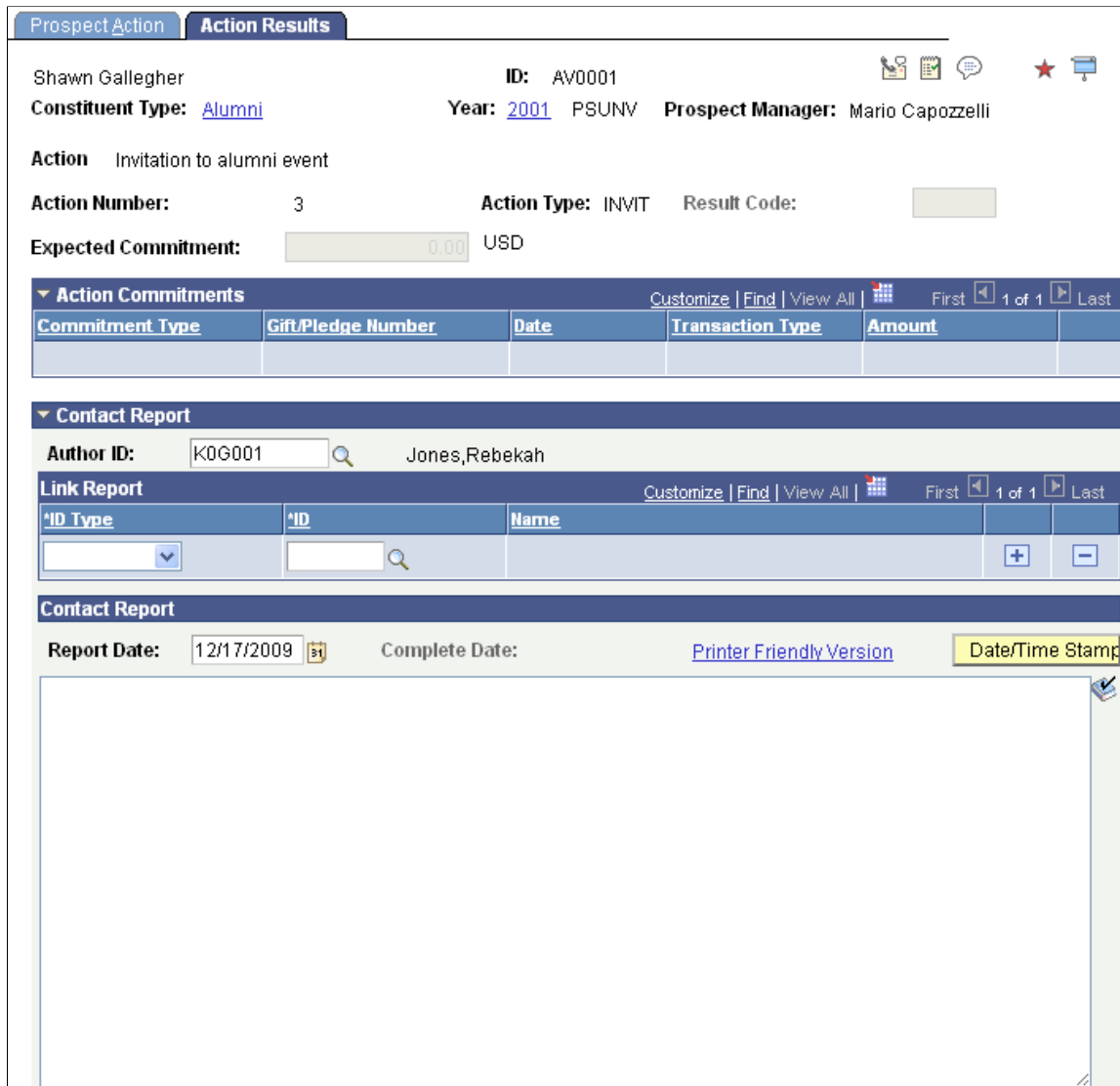
Before you can access the fields on this page, you must change the status of the action to *Complete* on the Prospect Action page.

Result Code	Select the result of the action from these values: *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, if known, that you expect to receive from the donor because of this action.
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 count it twice.

| Pledge Number | If the action that you are completing resulted in a pledge, enter the pledge number associated with the pledge that the prospect 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 pledges that were made and recorded in the past 60 days.

Action Commitments

Use this group box to associate gifts or pledges with a single action; you can specify more than one.

Action Gifts

The Result Code field value activates the prompt that creates the list of gifts that appear here, based on the Gift Days value on the Institution Installation 2 page.

Similarly, the Pledge Number field value activates the prompt that creates the list of pledges that appear here, based on the Pledge Days value on the Institution Installation 2 page.

| 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 recognition or soft credit allocations. In the Gift Nbr field, you can retrieve information about all gifts that were 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.
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 free-text field 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 the Require Contact Report check box is selected on the CR Installation page, then you cannot save a completed action without at least beginning a contact report. However, contact reports can be entered any time after an action is created; an action does not need to be complete in order to enter a report.

Related Links

Viewing Pledge Details
Viewing Gift Details
Implementing a Prospect Plan
Viewing Contact Reports

Maintaining Donor Appreciation Items

Access the Donor Appreciation page (Contributor Relations > Prospect Management > Donor Appreciation > Donor Appreciation).

Appreciation Item Detail

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 that you select determines which choices are available in the Resource field.

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 (Contributor Relations > Prospect Management > Donor Appreciation > Donor Appreciation Summary).

Related Links
Maintaining Donor Appreciation Items

Viewing Donor Appreciation Details

Access the Donor Appreciation Detail page (Click the Details link on the Donor Appreciation Summary page).

Related Links
Maintaining Donor Appreciation Items

Viewing Clearances for a Prospect

Access the Clearance inquiry page (Contributor Relations > Prospect Management > Stewardship Plans > Clearances > View Clearances).

Related Links
Clearing a Prospect for Cultivation

Filtering Prospect Actions

Access the Action Filter page (Contributor Relations > Prospect Management > Stewardship Plans > Constituent Actions > Action Summary - Person > Action Filter).

Image: Action Filter page

This example illustrates the fields and controls on the Action Filter page. You can find definitions for the fields and controls later on this page.

Enter any combination of search criteria to narrow the list of actions that appear for the constituent. Click the Search button to display the search results on the Action List page. Selection of multiple criteria implies an *AND,* requiring the action to meet all criteria that is selected.

Note: The fields on this page are the same ones used to filter actions in the Action Summary – Person component.

Action Type Code	Enter an action type code. The action type is a classification for the action. Values include *ASK, INVIT* (invitation), and *Phone Call.*
Action Status	Enter an action status for the overall state of an action. Values are *Scheduled, In Process,* or *Complete.*
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 List page displays the list of actions meeting your criteria.

Item

Ask Amount From and **Ask Amount To**	Enter a range for the ask amount. The Ask Amount From field contains the lowest amount in the range of actions to view; and the Ask Amount To field contains the highest amount. Ask amounts apply only to actions with the type *Ask*. If you enter an ask amount range, the value in the Action Type Code field changes to *Ask*.
Commitment Amount From and **Commitment Amount To**	Enter a range for the commitment amount. The Commitment Amount From field contains the lowest amount in the range of actions to view, and the Commitment Amount 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 value in the Action Type Code field 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 (Contributor Relations > Prospect Management > Stewardship Plans > Constituent Actions > Action Summary - Person > Action Summary).

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

Related Links
Creating Actions for Individual Prospects

Managing an Action List

Access the Action List page (Contributor Relations > Prospect Management > Stewardship Plans > Constituent Actions > Action List - Person).

Image: Action List page

This example illustrates the fields and controls on the Action List page. You can find definitions for the fields and controls later on this page.

Note: You can control access to this component through PeopleTools menu security.

Click the spouse rings icon to access an action list for the prospect's linked spouse, if one exists in the system.

Action Description	Click a linked action description to access the Prospect Action page, where you can update the constituent's action. When you are finished, the system returns you to the action list.
Delete	Click this button to remove the constituent's action from the system. You can only delete an action after all related data, such as assignments, strategies, and initiatives, have been removed from the action.
Add an Action	Click this button to access the Prospect Action page, where you can create a new action for the constituent. When you are finished, the system returns you to the action list.

To delete a constituent action:

1. Click the Select check box next to the action to be removed.

2. Click the Delete button.

    If the action has any related attributes, you receive an error message. The system dynamically creates the error message text to advise you of exactly what else must be removed from the action before the action itself can be removed. These error messages prevent orphan data from remaining in the system after the action has been removed.

Image: Example of error message

This example illustrates the fields and controls on the Example of error message. You can find definitions for the fields and controls later on this page.

If the action has no related attributes, you receive a warning message. Click OK to continue and completely remove the action from the system.

3. If you must remove related attributes before deleting the action, click the Action Description link and edit the action as appropriate on the pages of the Constituent Action component.

4. Click OK to return to the Action List page.

Viewing Action Details

Access the Action Detail page (Click the Detail link on the Action Summary page).

Image: Action Detail page

This example illustrates the fields and controls on the Action Detail page. You can find definitions for the fields and controls later on this page.

This page displays all fields related to an action. All group boxes are collapsible and expandable. If a group box is collapsed upon entering the page, it has no data. You can print this page using your browser's print functionality.

The fields on this page are the same as those on the pages of the Prospect Action component. Click the Edit Action button to access the Prospect Action pages and update any part of the action. When finished, click the OK button to return to the summary page that launched the Action Detail page to select Details, which the system displays with the updated action data.

Related Links

Creating Actions for Individual Prospects

Entering Action Results

Viewing Contact Reports

Access the Contact Report Summary page (Contributor Relations > Prospect Management > Stewardship Plans > Constituent Actions > Contact Reports - Person).

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.

Viewing Contact Report Details

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

Viewing To Do Lists

Access the To Do List - Staff page (Contributor Relations > Prospect Management > To Do Lists > To
Do List - Staff or To Do List - Volunteer or To Do List - Unit).

Image: To Do List - Staff page

This example illustrates the fields and controls on the To Do List - Staff page. You can find definitions for
the fields and controls later on this 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 a code for the institution name.

                                                         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 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

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 processing to your institution's financial system or interaction with external planned giving applications is not supported.

Common Elements Used in These Topics

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

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

• Define bequest details.

• Define constituent bequest details.

• Define institutional bequest information.

Understanding 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.

Pages Used to Track Bequests

Page Name	*Definition 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.

Page Name	Definition Name	Navigation	Usage
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 (Contributor Relations > Prospect Management > Planned Giving > Bequests > Bequest Detail).

Image: Bequest Detail page

This example illustrates the fields and controls on the Bequest Detail page. You can find definitions for the fields and controls later on this page.

This component enables you to track multiple bequest instruments that will benefit the institution on the demise of the donor.

Important! When you delete bequests at this level, the system deletes all child records as well.

Bequest Name	Name each bequest to differentiate multiple bequests from the same donor within the system. The name then appears on all pages of the component.
Bequest Date	Enter the date that the bequest was made or that your institution learned of the bequest. The default is the current 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 (Contributor Relations > Prospect Management > Planned Giving > Bequests > Bequest Detail 2).

Image: Bequest Detail 2 page

This example illustrates the fields and controls on the Bequest Detail 2 page. You can find definitions for the fields and controls later on this 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 (Contributor Relations > Prospect Management > Planned Giving > Bequests > Bequest Information).

Image: Bequest Information page

This example illustrates the fields and controls on the Bequest Information page. You can find definitions for the fields and controls later on this page.

Attachments

Click the View link to open the attachment in a new window. Click the Add Attachment button to upload a new attachment from within the component.

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.

• Define institutional trust information.

Pages Used to Track Trusts

Page Name	Definition 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 (Contributor Relations > Prospect Management > Planned Giving > Trusts > Trust Detail).

Image: Trust Detail page

This example illustrates the fields and controls on the Trust Detail page. You can find definitions for the fields and controls later on this 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 matures.
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 (Contributor Relations > Prospect Management > Planned Giving > Trusts > Trust Gift Information).

Image: Trust Gift Information page

This example illustrates the fields and controls on the Trust Gift Information page. You can find definitions for the fields and controls later on this 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 (Contributor Relations > Prospect Management > Planned Giving > Trusts > Trust Account Information).

Image: Trust Account Information page

This example illustrates the fields and controls on the Trust Account Information page. You can find definitions for the fields and controls later on this 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 (Contributor Relations > Prospect Management > Planned Giving > Trusts > Trust Beneficiary).

Image: Trust Beneficiary page

This example illustrates the fields and controls on the Trust Beneficiary page. You can find definitions for the fields and controls later on this page.

Defining Institutional Trust Information

Access the Trust Information page (Contributor Relations > Prospect Management > Planned Giving > Trusts > Trust Information).

Image: Trust Information page

This example illustrates the fields and controls on the Trust Information page. You can find definitions for the fields and controls later on this page.

Attachments

Click the View link to open the attachment in a new window. Click the Add Attachment button to upload a new attachment from within the component.

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	Definition 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 (Contributor Relations > Prospect Management > Planned Giving > Gift Annuities > Gift Annuity Details).

Image: Gift Annuity Details page

This example illustrates the fields and controls on the Gift Annuity Details page. You can find definitions for the fields and controls later on this 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 (Contributor Relations > Prospect Management > Planned Giving > Gift Annuities > Gift Annuity Beneficiaries).

Image: Gift Annuity Beneficiaries page

This example illustrates the fields and controls on the Gift Annuity Beneficiaries page. You can find definitions for the fields and controls later on this page.

Defining Institutional Gift Annuity Information

Access the Gift Annuity Information page (Contributor Relations > Prospect Management > Planned Giving > Gift Annuities > Gift Annuity Information).

Image: Gift Annuity Information page

This example illustrates the fields and controls on the Gift Annuity Information page. You can find definitions for the fields and controls later on this page.

Attachments

Click the View link to open the attachment in a new window. Click the Add Attachment button to upload a new attachment from within the component.

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	Definition 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 (Contributor Relations > Prospect Management > Planned Giving > Pooled Income Funds > Pooled Income Details).

Image: Pooled Income Details page

This example illustrates the fields and controls on the Pooled Income Details page. You can find definitions for the fields and controls later on this 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 (Contributor Relations > Prospect Management > Planned Giving > Pooled Income Funds > Pooled Income Beneficiaries).

Image: Pooled Income Beneficiaries page

This example illustrates the fields and controls on the Pooled Income Beneficiaries page. You can find definitions for the fields and controls later on this page.

Defining Institutional Pooled Income Fund Information

Access the Pooled Income Information page (Contributor Relations > Prospect Management > Planned Giving > Pooled Income Funds > Pooled Income Information).

Image: Pooled Income Information page

This example illustrates the fields and controls on the Pooled Income Information page. You can find definitions for the fields and controls later on this page.

Attachments

Click the View link to open the attachment in a new window. Click the Add Attachment button to upload a new attachment from within the component.

Working with a Planned Giving Profile

This section discusses how to:

- View a planned giving profile.

- View bequest details.

- View trust details.

- View gift annuity details.

- View pooled income fund details.

Pages Used to Work with a Planned Giving Profile

Page Name	Definition 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 a Bequest link on the Planned Giving Profile page.	View additional information about a bequest, including any assets, codicils, installments, or comments.
Trust Detail	AV_TRUST1_SP	Click a Trust link on the Planned Giving Profile page.	View information about a trust and its beneficiaries.
Gift Annuity Detail	AV_GIFTAN1_SP	Click a Gift Annuity link on the Planned Giving Profile page.	View information about a gift annuity, its account information, and its beneficiaries.
Pooled Income Fund Detail	AV_PINC1_SP	Click a Pooled Income Fund link on the Planned Giving Profile page.	View detailed information about a donor's portion of a pooled income fund.

Viewing a Planned Giving Profile

Access the Planned Giving Profile page (Contributor Relations > Prospect Management > Planned Giving > Update Planned Giving Profile).

Image: Planned Giving Profile page

This example illustrates the fields and controls on the Planned Giving Profile page. You can find definitions for the fields and controls later on this page.

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.
Planned Gift Name	Click any linked name to view its specifics on the appropriate detail page.
Irrevocable	This check box is selected if the planned gift is not able to be retracted by the donor and is marked as irrevocable on the Trust or Gift Annuity page.

Viewing Bequest Details

Access the Bequest Detail page (Click a Bequest link on the Planned Giving Profile page).

All group boxes are collapsible and expandable. If a group box is collapsed upon entering the page, it has no data. You can print this page using your browser's print functionality. The fields on this page are the same as those in the Bequest Details component.

Click the View link in the Attachments group box to open the attachment in a new window.

See Tracking Bequests.

Viewing Trust Details

Access the Trust Detail page (Click a Trust link on the Planned Giving Profile page).

All group boxes are collapsible and expandable. If a group box is collapsed upon entering the page, it has no data. You can print this page using your browser's print functionality. The fields on this page are the same as those in the Trust Details component.

Click the View link in the Attachments group box to open the attachment in a new window.

See Tracking Trusts.

Viewing Gift Annuity Details

Access the Gift Annuity Detail page (Click a Gift Annuity link on the Planned Giving Profile page).

All group boxes are collapsible and expandable. If a group box is collapsed upon entering the page, it has no data. You can print this page using your browser's print functionality. The fields on this page are the same as those in the Gift Annuity Details component.

Click the View link in the Attachments group box to open the attachment in a new window.

See Tracking Gift Annuities.

Viewing Pooled Income Fund Details

Access the Pooled Income Fund Detail page (Click a Pooled Income Fund link on the Planned Giving Profile page).

All group boxes are collapsible and expandable. If a group box is collapsed upon entering the page, it has no data. You can print this page using your browser's print functionality. The fields on this page are the same as those in the Pooled Income Details component.

Click the View link in the Attachments group box to open the attachment in a new window.

See Tracking Pooled Income Funds.

Chapter 11

Managing Initiatives

Understanding Initiative Management

This section lists prerequisites and discusses initiative management.

Related Links

[Understanding Campaign Management](#)
[Understanding Membership](#)
[Understanding Volunteer Management](#)
[Understanding Event Initiative Management](#)
[Understanding Other Initiatives](#)

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.

Related Links

[Understanding Initiatives](#)

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	Definition 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 (Contributor Relations > Initiatives > Campaign Initiatives > Manage Campaigns > Campaign Initiatives).

Image: Campaign page

This example illustrates the fields and controls on the Campaign page. You can find definitions for the fields and controls later on this 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 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 "Creating an Event" (PeopleSoft Campus Solutions 9.2: Campus Community)

Attendance Goal   Enter a goal that states the expected number of constituents attending 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 define 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

   An example is the group of alumni to which you want to send an invitation or appeal. This piece is tied to communications.

Pages Used to Define an Initiative Audience

Page Name	Definition 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 AVINTBM process for audiences. You can build the audiences that are used for initiatives, move audiences from the temporary table AV_INTV_TMP_TBL to the permanent table AV_INITIATIVES, or both.

Defining the Audience

Important! Mass Change is a deprecated product. Support will be maintained for this product, but no new development will be produced for Mass Change. It is strongly recommended that you use Application Engine instead. For more information on PeopleSoft Application Engine, see PeopleTools: Application Engine.

Access the Audience page (Contributor Relations > Initiatives > Campaign Initiatives > Manage Campaigns > Campaign Initiatives > Audience).

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.

Image: Audience page

This example illustrates the fields and controls on the Audience page. You can find definitions for the fields and controls later on this 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 page.

Note: Audiences must be linked to an initiative to use Mass Change to assign communications to audience members.

Selection Process

The appearance of this page changes, depending on the selection process you select. If you select *Population Selection,* you can select audiences built using the Population Selection process on the Audience Criteria page. If you select *Build/Merge Process,* you can select audiences built using standard audience build/merge functionality.

Audience

Pers/Org	Select an option: *Person, Organization,* or *Both.* The value *Both* is only available if you selected the Population Selection process.
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. This field is only available if you chose to use the Build/Merge Process.
Workset Name	If you use a workset containing the members of the audience, enter the name. You can enter only those worksets that you have access to. This field is only available if you chose to use the Build/Merge Process.
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. This field is only available if you chose to use the Build/Merge Process.

Related Links
Setting Up Attribute Types
Setting Up Audience Criteria

Building and Merging the Audience

Access the Initiative Audience Build page (Contributor Relations > Initiatives > Process Initiatives > Initiative Audience Build).

The Initiative Audience Build/Merge Application Engine process (AVINTBM) generates the actual list of audience members and builds the audience based on the selection process you select.

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.

After you run the Initiative Audience Build process you must manually purge the AV_INTV_TMP_TBL table if you want to edit the IDs selected to be included in the audience. This step is only available if you do not select the Merge into Initiative Audience check box when you run the process. If you select both the Build Temp Tables and Merge into Initiative Audience check boxes when running the process, the system builds the temp tables then immediately adds the IDs in the temporary tables to the AV_INITIATIVE table without allowing any edits to the selected IDs.

Selection Process

The AVINTBM process behaves differently, depending on whether you select *Population Selection* or *Build/Merge Process.* If you select the Build/Merge Process, the system launches the AVPINT Cobol process and builds the audiences using that process.

Note: For performance considerations, there is a maximum of 400 person/organization combinations of audience criteria per process instance. If the total member organizations to be built results in more than 400 combinations, set up the member organizations in blocks and run the process after setting up each block of organizations. When rebuilding audiences, select them with this maximum in mind and run the process more than once, selecting different groups of audiences to be rebuilt. An example of a situation that would exceed the maximum is building, in one run, 101 organizations each having four audience criteria.

Processes to Run

Using the check boxes in this group box, you can build an audience, merge an audience, or both.

Build Temp Tables	Select this option to generate the actual list of audience members and store it in a temporary table called AV_INTV _TMP_TBL. When the records are in this table, they can be analyzed to determine if the audience list is acceptable.
Merge into Initiative Audience	Select this option to merge any audiences in the temporary table (AV_INTV_TMP_TBL) with the permanent table (AV_ INITIATIVE).

Build Audience

The system displays audiences here that are ready to be built. If you select the Population Selection option, this grid only shows audiences built using the Population Selection process.

Rebuild Audience

If you have already built an audience, to rebuild it use this group box to enter your criteria. You must rebuild audiences based on the selection process you select. When you rebuild an audience, the process adds any additional constituents that meet the audience criteria since the time the audience was last built.

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	Definition 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 (Contributor Relations > Initiatives > Campaign Initiatives > Manage Campaigns > Campaign Initiatives > Related Initiatives).

Image: Related Initiative page

This example illustrates the fields and controls on the Related Initiative page. You can find definitions for the fields and controls later on this page.

You can link campaigns, volunteer efforts, membership initiatives, events, or other institution-defined initiative types as a subunit 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	Definition 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 persons and units that support an initiative.

Assigning Initiative Resources

Access the Resources page (Contributor Relations > Initiatives > Campaign Initiatives > Manage Campaigns > Campaign Initiatives > Resources).

Image: Resources page

This example illustrates the fields and controls on the Resources page. You can find definitions for the fields and controls later on this 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.

Staff Role (responsible manager staff role)	In the upper left hand field of the Responsible Manager group box, enter the ID of the responsible person who should get reports and notifications related to the initiative. Only valid defined staff and units are available for assignment.
	In the Staff Role field, 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.
Staff Role (other primary staff resource role)	In the upper left hand field of the Other Primary Staff Resources group box, enter the IDs of 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.
	In the Staff Role field, 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.
Unit Role (responsible unit role)	In the upper left hand field of the Responsible Unit group box, enter the name of the unit that is responsible for the initiative.

In the Unit Role field, 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	Definition 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 (Contributor Relations > Initiatives > Campaign Initiatives > Manage Campaigns > Campaign Initiatives > PR Plan).

Image: PR Plan page

This example illustrates the fields and controls on the PR Plan page. You can find definitions for the fields and controls later on this 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
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 appear on the To Do List are determined by the setting you make in the Reminder Days field on the Institution Installation 2 page.

Creating Initiative Attachments

This section discusses how to create attachments for any type of initiative.

Page Used to Create Initiative Attachments

Page Name	Definition Name	Navigation	Usage
Attachments	AV_INTV_CMPGN_ATCH AV_INTV_MEMBR_ATCH AV_INTV_EVNT_ATCH AV_INTV_VOL_ATCH AV_INTV_OTHR_ATCH	• Contributor Relations, Initiatives, Campaign Initiatives, Manage Campaigns, Campaign Initiatives, Attachments • Contributor Relations, Initiatives, Membership Initiatives, Membership Initiatives, Attachments • Contributor Relations, Initiatives, Event Initiatives, Manage Event Initiatives, Event Initiatives, Attachments • Contributor Relations, Initiatives, Volunteer Initiatives, Manage Volunteer Initiatives, Volunteer Initiatives, Attachments • Contributor Relations, Initiatives, Other Initiatives, Manage Other Initiatives, Other Initiatives, Attachments	Create and view attachments to an initiative.

Creating Attachments

Access the Attachments page for an initiative (for example, Contributor Relations > Initiatives > Campaign Initiatives > Manage Campaigns > Campaign Initiatives > Attachments).

Image: Attachments page for initiatives

This example illustrates the fields and controls on the Attachments page for initiatives. You can find definitions for the fields and controls later on this page.
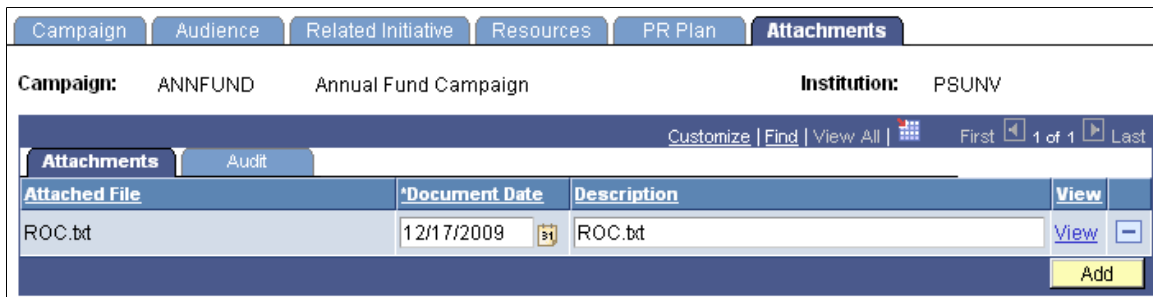
Click the View link to open the attachment in a new window. Click the Add button to upload a new attachment from within the component.

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	Definition 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.

Page Name	Definition Name	Navigation	Usage
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 (Contributor Relations > Initiatives > Campaign Initiatives > Manage Campaigns > Campaign Budget).

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 appears 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 appears 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 (Contributor Relations > Initiatives > Campaign Initiatives > Manage Campaigns > Campaign Budget Detail).

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 appears 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:

• Enter initiative action information.

• Add action information.

Pages Used to Create Initiative Actions

Page Name	Definition 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.

Page Name	*Definition Name*	*Navigation*	*Usage*
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 (Contributor Relations > Initiatives > Campaign Initiatives > Campaign Actions > Initiative Action).

Image: Initiative Action page

This example illustrates the fields and controls on the Initiative Action page. You can find definitions for the fields and controls later on this 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 (Contributor Relations > Initiatives > Campaign Initiatives > Campaign Actions > Action Info).

Image: Action Info page

This example illustrates the fields and controls on the Action Info page. You can find definitions for the fields and controls later on this 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.

Pages Used to View Action Summary Information

Page Name	Definition Name	Navigation	Usage
Initiative Action Summary	AV_INTV_ACTN_SMRY	• Contributor Relations > Initiatives > Campaign Initiatives > Initiative Action Summary • Contributor Relations > Initiatives > Membership Initiatives > Membership Action Summary • Contributor Relations > Initiatives > Event Initiatives > Event Action Summary • Contributor Relations > Initiatives > Volunteer Initiatives > Volunteer Action Summary • Contributor Relations > Initiatives > Other Initiatives > Oth 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 <u>Viewing To Do Lists</u>.

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	Definition 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 appear 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	Definition 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

Important! Mass Change is a deprecated product. Support will be maintained for this product, but no new development will be produced for Mass Change. It is strongly recommended that you use Application Engine instead. For more information on PeopleSoft Application Engine, see PeopleTools: Application Engine.

Important! Letter Generation (Letter Gen) is a deprecated product. Support will be maintained for this product, but no new development will be produced for Letter Gen. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see "Using the Communication Generation Process" (PeopleSoft Campus Solutions 9.2: Campus Community)

This section provides overviews of mass change and the initiative and membership mass change templates, and also discusses how to:

• Select Student Administration criteria.

• Select criteria and defaults.

• Run the Mass Change SQR process.

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

Field Name	Value taken from this field
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. You should 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 select 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. You should 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	

Table	Field	Key
EVNT_3C_GRP_VW	EVENT_3CS_ID	

After the CR-Mbrshp-Insert3CEngine step has run, run the 3C Engine and select your options for processing joint records. This generates all communication records for processing by the letter generator.

Pages Used to Use Mass Change for Initiative and Membership Letters

Page Name	Definition Name	Navigation	Usage
Student Administration	MC_DEFN_SA	Contributor Relations > Initiatives > Process Initiatives > Initiative Mass Change > Student Administration	Specify Campus Solutions-specific mass change parameters.
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 Student Administration Criteria

Access the Student Administration page (Contributor Relations > Initiatives > Process Initiatives > Initiative Mass Change > Student Administration).

Image: Student Administration page

This example illustrates the fields and controls on the Student Administration page. You can find definitions for the fields and controls later on this page.

Academic Institution	Enter the institution for which the communications are to be created when the mass change process is run.
CR Business Unit	For a membership mass change, enter the CR Business Unit that owns the membership organization for which the mass change is to be run. This business unit determines which membership organizations appear in the *Membership Organization* field on the Criteria and Defaults page.

Selecting Criteria and Defaults

Access the Criteria and Defaults page (Contributor Relations > Initiatives > Process Initiatives > Initiative Mass Change > Criteria and Defaults).

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.

Image: Criteria and Defaults page

This example illustrates the fields and controls on the Criteria and Defaults page. You can find definitions for the fields and controls later on this page.
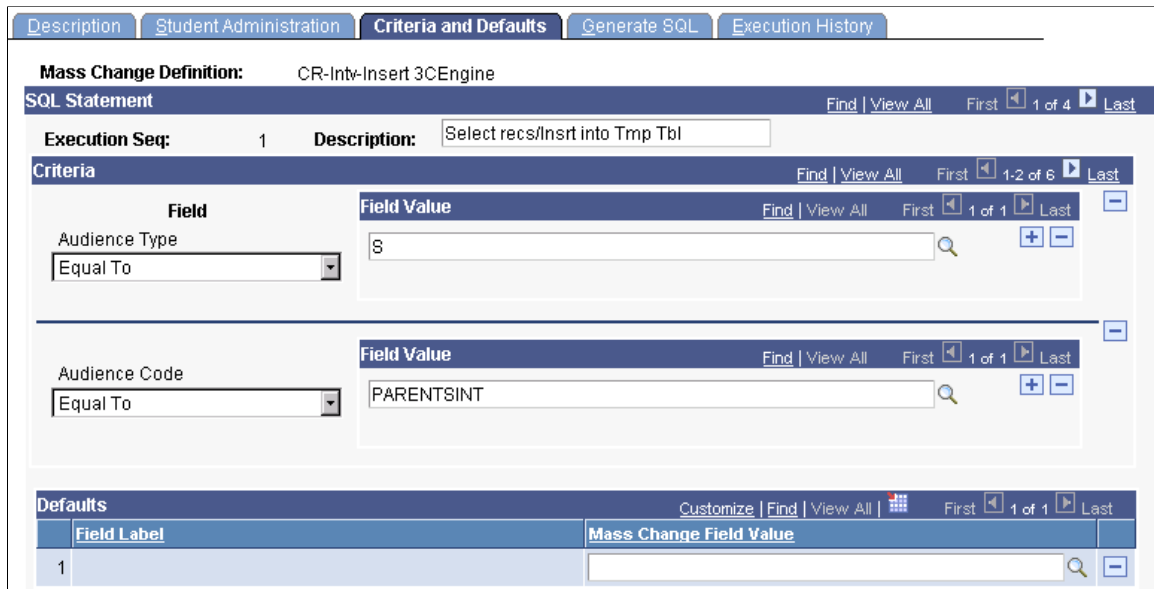
Criteria	Set criteria values using SQL operators and values. For example, to select an audience type of Segmentation, you would select *Equal To* and enter a field value of *S*.
	You must have a thorough understanding of your data and dependencies before selecting criteria. Many codes are not intuitive, 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 in PeopleSoft Campus Community.

Running the Mass Change SQR Process (MASSCHNG)

Access the Run Mass Change page (Campus Community > Communications > Mass Change - Communications > Run Mass Change). 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. You can also run the Mass Change process from within the 3C Engine component.

See "Understanding Communication Management" (PeopleSoft Campus Solutions 9.2: Campus Community)

Chapter 12

Managing Campaigns

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 Setting Up Campaigns.

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 multiyear. Many campaigns start in a silent, nonpublic 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, and their subtasks. These features are, in order: assess feasibility, define campaign strategy, implement plan, track assignments, track progress, and recognize participants.

Image: Contributor Relations campaign management features

This graphic illustrates the flow of Contributor Relations campaign management features:
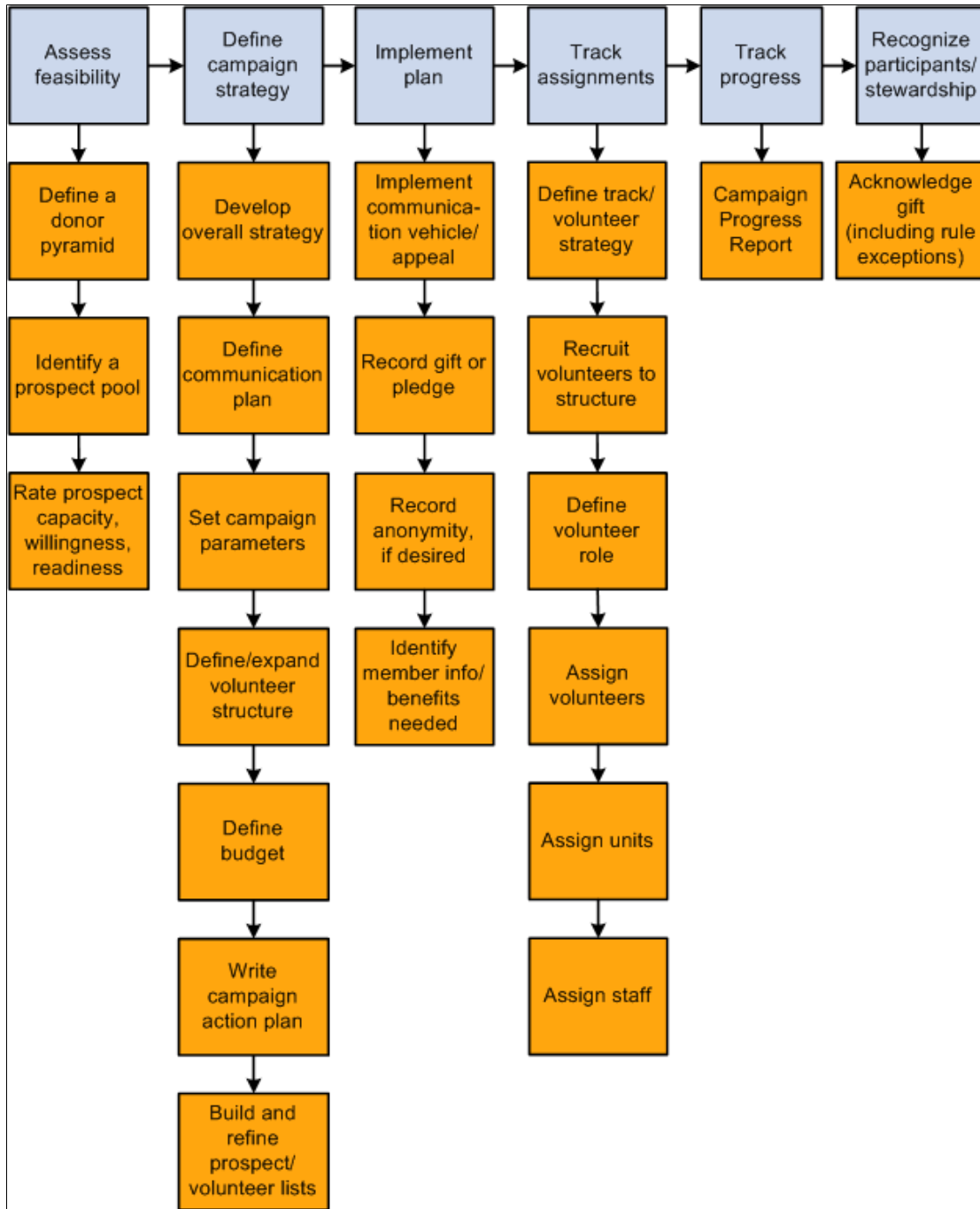
A campaign is one type of initiative in Contributor Relations. All initiative types share some common management pages. Some initiatives, such as campaigns, require additional management that is specific to their purpose. The campaign-specific management is covered in this set of topics; refer to the following set of topics for information about managing all types of initiatives.

Related Links

Understanding Initiative Management

Managing Campaign 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 set of topics to manage the remaining campaign-specific functionality.

See Understanding Initiative Management.

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 for campaigns.

• Set annual goals.

• Set department goals.

• Set unit goals.

Pages Used to Set Campaign Initiative Goals

Page Name	Definition 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.

Page Name	Definition Name	Navigation	Usage
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 (Contributor Relations > Initiatives > Campaign Initiatives > Manage Campaigns > Campaign Goals > Initiative Goals). This page enables you to break down the initiative's overall goal into measurable milestones, to be used in custom reports.

Image: Initiative Goals page

This example illustrates the fields and controls on the Initiative Goals page. You can find definitions for the fields and controls later on this page.
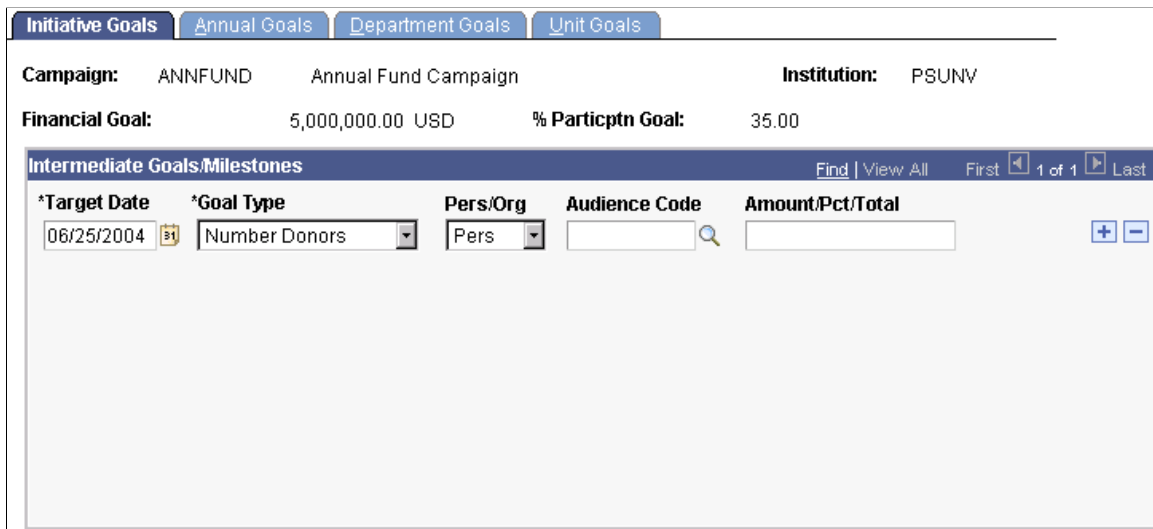
Upon entering this page the Campaign name, Financial Goal, and % Particptn Goal (percent participation goal) for the initiative appear. Values for these fields are based on the values entered in the Campaign Initiatives component.

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 (Contributor Relations > Initiatives > Campaign Initiatives > Manage Campaigns > Campaign Goals > Annual Goals).

Image: Annual Goals page

This example illustrates the fields and controls on the Annual Goals page. You can find definitions for the fields and controls later on this page.

Campaigns can be one-year or multiyear 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 to be involved with the campaign during this goal year.
Nbr Prspct Goal (number of prospects goal)	Enter the anticipated number of prospects to made 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 (Contributor Relations > Initiatives > Campaign Initiatives > Manage Campaigns > Campaign Goals > Department Goals).

Image: Department Goals page

This example illustrates the fields and controls on the Department Goals page. You can find definitions for the fields and controls later on this page.
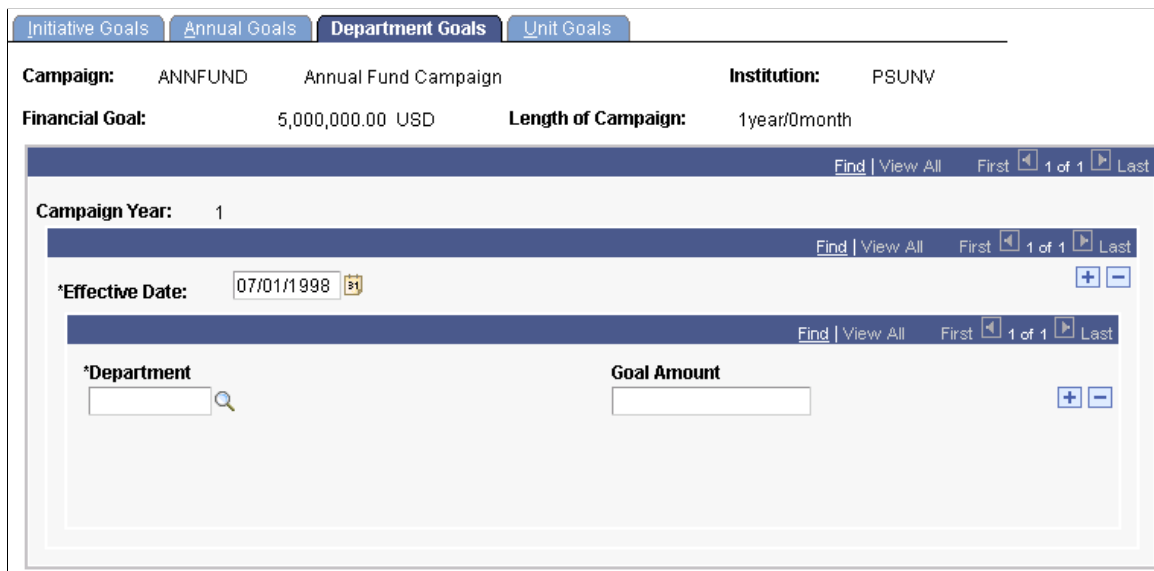
Departments at your institution can be assigned a total dollar amount that is their goal amount to raise for each campaign year.

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 (Contributor Relations > Initiatives > Campaign Initiatives > Manage Campaigns > Campaign Goals > Unit Goals).

Image: Unit Goals page

This example illustrates the fields and controls on the Unit Goals page. You can find definitions for the fields and controls later on this 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	Definition 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 (Contributor Relations > Initiatives > Campaign Initiatives > Prospect List).

This page is useful to view prospect asks, both outstanding and completed.

You can build a workset from the prospects listed on this page.

Related Links

Building a Workset From a Page in the System

Generating the Campaign Progress Report

This section discusses how to generate campaign progress reports.

Page Used to Generate the Campaign Progress Report

Page Name	Definition 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 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 (Contributor Relations > CR Reports > Giving Reports > Campaign Progress Report).

Institution	Select the institution for which to generate a report.
Campaign	Select the campaign for which to view progress. Campaigns are broad fund-raising 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.

Related Links

Contributor Relations Reports: Selected Reports

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	*Definition 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 (Contributor Relations > Initiatives > Campaign Initiatives > Top Campaign Donors).

This page contains ID, Name, Commitment 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.

Related Links
Building a Workset From a Page in the System

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	Definition 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 (Contributor Relations > Initiatives > Campaign Initiatives > Campaign Summary). You can 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.

Related Links
Defining an Initiative

Viewing Initiative Details

Access the Initiative Detail page (Click the Details link on the Campaign Summary 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

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 Understanding Initiatives.

Common Elements Used in These Topics

ID Type	Identify the constituent as a *Person* or an *Organization.*
ID/Org ID (ID/organization 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 set of topics; refer to the following set of topics for information about managing all types of initiatives.

Related Links

Understanding Initiative Management

Managing Membership 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 set of topics to manage the remaining membership-specific functionality.

See Understanding Initiative Management.

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	Definition Name	Navigation	Usage
Member Organization	AV_MBR_ORG	Contributor Relations > Member 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 > Member 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 > Member 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 > Member 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 > Member 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 (Contributor Relations > Member Organizations > Manage Member Organizations > Member Organization > Member Organization).

Image: Member Organization page

This example illustrates the fields and controls on the Member Organization page. You can find definitions for the fields and controls later on this 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 appears 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 (Contributor Relations > Member Organizations > Manage Member Organizations > Member Organization > Member Criteria).

Image: Member Criteria page

This example illustrates the fields and controls on the Member Criteria page. You can find definitions for the fields and controls later on this 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.

Related Links
Setting Up Audience Criteria

Defining Membership Objectives

Access the Member Objectives page (Contributor Relations > Member Organizations > Manage Member Organizations > Member Organization > Member Objectives).

Image: Member Objectives page

This example illustrates the fields and controls on the Member Objectives page. You can find definitions for the fields and controls later on this 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 (Contributor Relations > Member Organizations > Manage Member Organizations > Member Organization > Member Dues).

Image: Member Dues page

This example illustrates the fields and controls on the Member Dues page. You can find definitions for the fields and controls later on this 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 Membership, Sustaining, Lifetime Membership,* 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 (nonexpiring) 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 nongift 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 appears. 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 (first)

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 (Contributor Relations > Member Organizations > Manage Member Organizations > Member Organization > Member Resources).

Image: Member Resources page

This example illustrates the fields and controls on the Member Resources page. You can find definitions for the fields and controls later on this 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 with 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 (new volunteer)

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 and merge member lists.

Note: In addition to running these processes, you can add constituents as complimentary members by entering the membership to a member organization that allows complimentary memberships through a membership session.

Page Used to Build Membership Lists

Page Name	Definition Name	Navigation	Usage
Membership Audience Build	AV_RUNCTL_MBR	Contributor Relations > Member Organizations > Manage Member Organizations > Build Membership Audience	Run the Membership Audience Build/Merge Application Engine process (AVMBRBM). You can build the list of members for a member organization, move audiences from the temporary AV_MBR_TEMP _TBL table to the permanent AV_MEMBERSHIP table, or both.

Building and Merging Member Lists

Access the Membership Audience Build page (Contributor Relations > Member Organizations > Manage Member Organizations > Build Membership Audience).

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.

Selection Process

The AVMBRBM process behaves differently, depending on whether you select *Population Selection* or *Build/Merge Process*. Selecting *Population Selection* builds memberships only for those membership organizations using the Population Selection process as the setup method for the member audience. Similarly, selecting *Build/Merge Process* builds only memberships with audience criteria created using the Build/Merge option on the Audience Criteria setup page.

Processes to Run

Using the check boxes in this group box, you can build an member list, merge an list, or both.

Build Temp Tables	Select this option to generate the actual list of members and store it in the temporary table AV_MBR_TEMP_TBL. When the records are in this table, they can be analyzed using SQL to determine if the member list is acceptable.
Merge into Initiative Audience	Select this option to add 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.

Build Audience

The system displays member audiences here that are ready to be built. If you select the Population Selection option, this grid shows only member audiences built using the Population Selection process.

Rebuild Audience

If you have already built a member list and want to rebuild it, use this group box to enter your criteria. When you rebuild a member audience, the process adds any additional members that meet the criteria since the time the member audience was last built.

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	Definition 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 (Contributor Relations > Initiatives > Membership Initiatives > Membership Goals > Initiative Goals).

Image: Initiative Goals page

This example illustrates the fields and controls on the Initiative Goals page. You can find definitions for the fields and controls later on this 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 appears. 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 (Contributor Relations > Initiatives > Membership Initiatives >
Membership Goals > Annual Goals).

Image: Annual Goals page

This example illustrates the fields and controls on the Annual Goals page. You can find definitions for the
fields and controls later on this 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   Indicates the expected number of memberships to be generated
memberships goal)   during this membership campaign year from this membership
                                           initiative.

Mbrshp Pct Increase (membership   Enter the increase in overall memberships from one year to the
percent increase)   next that is expected from this membership initiative.

Nbr Members Goal (number of   Enter the anticipated number of members for this membership
members goal)   campaign year from this membership initiative. This number
                                           should include joint members.

Mbrs Pct Increase (members percent   Enter the anticipated increase in members (including joint
increase goal)   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 tender type details.

- 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 appears 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.

Related Links

Creating and Working with Sessions

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. This payment includes 750 USD as nongift dues and 250 USD as 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. This payment includes 750 USD as nongift dues and 250 USD as 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	N/A	1,000	N/A	1,000	N/A
AV_MBR_DTL	1,000	N/A	1,000	N/A	N/A	N/A
AV_GIFT_DTL	250	N/A	250	N/A	N/A	N/A
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	Definition 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 - Check page	AV_TENDER_DTL_SP	Click the Tender Detail button on the Gift Entry, Membership Entry, Gift Adjustment, or Membership Adjustment page.	Enter check information for gift or membership payments.
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.
What is a security code?	SSF_SS_PMT_CVV	Click the What is a security code? link on the Tender Type Detail - Credit Card page.	Learn more about security codes in credit card transactions.
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 (Contributor Relations > Session Management > Enter Memberships > Membership Entry).

Image: Membership Entry page

This example illustrates the fields and controls on the Membership Entry page. You can find definitions for the fields and controls later on this 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 appear on this page:

Currency Code	Fields That Appear	Fields That Disappear
Your business unit's base	None	Display in Other Currency button
	None	Base Amt
Any other currency	Display in Other Currency button	None
	Base Amt	None

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.
Search	Click to access the Search/Match page, where you can search for a member. See "Using Search/Match" (PeopleSoft Campus Solutions 9.2: Campus Community).
📋	Click to paste a carried ID found using Search/Match functionality.
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 Amount, Tender, and Total Amount 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 appear 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 appears, 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.

Depending on the tender type you select, click this button to enter its appropriate details on the Tender Type Detail page:

For *Check,* enter the check number on the page that appears.

For *Credit Card,* enter the constituent's credit card information on the page that appears.

If the credit card gift was mass loaded, the system populates address information, based on the Address Type field selected on the Mass Load Gift/Pledge page. Mass loaded credit card transactions are treated as though the user had entered the credit card gift online.

For *GIK,* enter the constituent's gift-in-kind details on the page that appears.

For *Security,* enter the description and details of the constituent's securities on the page that appears.

See Entering Tender Type Details.

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 appears 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 appear 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:* Current 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 Viewing Membership History.

Entering Tender Type Details

Access the Tender Type Detail page (Click the Tender Detail button on the Gift Entry, Membership Entry, Gift Adjustment, or Membership Adjustment page). This page changes depending on the tender type selected in the Special Fields field on the Tender Types setup page.

Check Number	If you selected *Check* as the tender on the Membership Entry page, enter the check number.
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 Defining Credit Card Types.
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.
Security Code	Enter the security code as it appears on the credit card. This field does not appear if the Security Code-Batch check box is cleared on the CR Merchant page.
What is a security code?	Click this link to access an explanatory page explaining the reason for using a security code as well as its location on a credit card. This field does not appear if the Security Code-Batch check box is cleared on the CR Merchant 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.

For the Tender Type Detail – Gift-in-Kind page:

Gift Description	Enter a brief description of the gift-in-kind to be incorporated into the AVAK LetterGen.SQC so that it can be used in an acknowledgement.
Gift Purpose	Enter the reason for the gift and how it will be used.
Estimated Value	Enter an educated guess of the value of the gift. This field is used for reporting purposes only; it is not included in the AVAK LetterGen.SQC, as it is the donor's responsibility to accurate declare the gift's value.
Written Appraisal	Select this check box when a written appraisal is received with the gift-in-kind.
Appraised Value	Enter the valued amount of the gift-in-kind, as determined by an external appraiser.
Appraisal Date	Enter the date that the appraisal was made.

For the Tender Type Detail - Securities page, Security Information 1 tab:

Gift Description	Enter a brief description of the security to be incorporated into the AVAK LetterGen.SQC so that it can be used in an acknowledgement.
Stock/Security Name and **Symbol**	Enter the name and trading symbol for the company whose stock has been given.
Number of Shares	Enter the number of shares of the stock or security being transferred to the institution as a gift.
Estimated Value	Enter an educated guess of the value of the gift or the average of the Day Low/Day High or Ask/Bid for the day on which the stock is determined to be transferred to the institution. This

field is included in the AVAK LetterGen.SQC for use in the Acknowledgement template.

The Stock/Security Name carries over from the Security Information 1 tab.

For the Tender Type Detail - Securities page, Security Information 2 tab:

Day Low/Ask   Enter the lowest amount at which the stock/security traded on the day of transfer or, if no trades occurred, the Ask amount as reported by the stock exchange.

Day High/Bid   Enter the highest amount at which the stock/security traded on the day of transfer or, if no trades occurred, the Ask amount as reported by the stock exchange.

Public   Select this check box if the stock is publicly traded.

Assigning Membership Designations and Associating Others with a Membership

Access the Designations page (Contributor Relations > Session Management > Enter Memberships > Membership Entry > Designations).

Image: Designations page

This example illustrates the fields and controls on the Designations page. You can find definitions for the fields and controls later on this 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 appear 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 appears 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.

Related Links
Setting Up Institution Defaults

Processing Member Credit Card Transactions

If your membership sessions contain credit card payments, you must process those transactions. Use the pages in the following set of topics to select membership transactions for processing, and authorize and capture the transactions.

See Processing Credit Card Transactions.

Adjusting Membership Dues Payments

This section provides an overview of membership dues payment adjustments 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.

For gifts entered through membership, fiscal year and gift date information on the GIFT record are based on the membership data entry date, not the membership start date. This also applies to any changes made through Membership Adjustment.

Pages Used to Adjust Membership Dues Payments

Page Name	*Definition 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 (Contributor Relations > Session Management > Enter Memberships > Membership Adjustment > Member Adjust Summary).

Image: Member Adjust Summary page

This example illustrates the fields and controls on the Member Adjust Summary page. You can find definitions for the fields and controls later on this page.
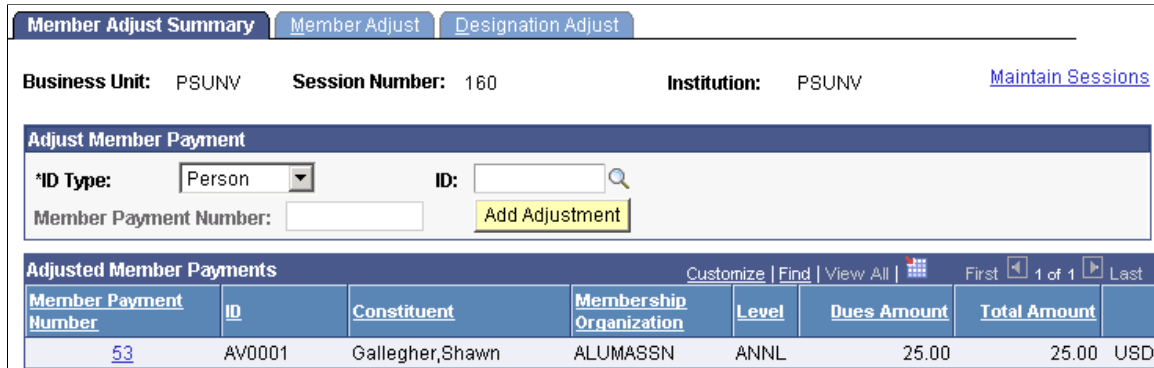
Member Payment Number	Enter the original number for the transaction to adjust. Available values include the existing posted membership payments for the ID that you select.
	Note: You must enter an ID before selecting a membership payment number.

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 (Contributor Relations > Session Management > Enter Memberships > Membership Adjustment > Member Adjust).

Image: Member Adjust page

This example illustrates the fields and controls on the Member Adjust page. You can find definitions for the fields and controls later on this 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.
Expiration Date	This field is also editable for all lifetime members. You can use it to change the end date for both regular and complimentary lifetime memberships.

Important! The original transaction must be posted before you can adjust it. If a transaction does not appear in the Member Payment Number. 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 nonzero 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.

Related Links
Entering Dues Payment Detail

Adjusting Designation and Associated Constituent Information

Access the Designation Adjust page (Contributor Relations > Session Management > Enter Memberships > Membership Adjustment > Designation Adjust).

Image: Designation Adjust page

This example illustrates the fields and controls on the Designation Adjust page. You can find definitions for the fields and controls later on this 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 percent 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 appear 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.* |

Related Links

Processing and Posting Sessions
Assigning Membership Designations and Associating Others with a Membership

Preparing for Membership Letters

Important! Mass Change is a deprecated product. Support will be maintained for this product, but no new development will be produced for Mass Change. It is strongly recommended that you use Application Engine instead. For more information on PeopleSoft Application Engine, see PeopleTools: Application Engine.

Campus Solutions 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 process both the trigger and mass change at the same time on the 3C Engine Parameters 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 3C Engine Parameters page, the system runs the mass change and also uses the trigger created to write the communication record.

Related Links

"Running the 3C Engine Process" (PeopleSoft Campus Solutions 9.2: Campus Community)
Understanding the Membership Mass Change Template

Viewing Membership Progress

This section discusses how to view membership progress.

Page Used to View Membership Progress

Page Name	Definition 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 (Contributor Relations > Initiatives > Membership Initiatives > Membership Initiative Progress).

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 lists the pages used to view membership history information for a person.

Pages Used to View Membership History

Page Name	*Definition 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.

Page Name	Definition Name	Navigation	Usage
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.

Related Links

Entering Dues Payment Detail

Assigning Membership Designations and Associating Others with a Membership

Viewing Membership Benefit History

This section lists the page used 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	Definition 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	Definition 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 appear 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.

Related Links

Entering Dues Payment Detail

Chapter 14

Managing Volunteers

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 Setting Up Event Initiatives.

Before you can assign volunteers to tasks, roles, and projects, you must set up your system's volunteer data.

See Adding Resources.

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 set of topics; refer to the following set of topics for information about managing all types of initiatives.

Related Links
Managing Volunteer Initiative Information

Managing Volunteer 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 topics referenced below to define the basics for the initiative. You can then use this topic to manage the remaining volunteer-specific functionality.

See <u>Understanding Initiative Management</u>.

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 within the structure.

- Create subgroup volunteer assignments.

Related Links
<u>Assigning Volunteers to Specific Tasks</u>

Pages Used to Assign Volunteers to Roles

Page Name	*Definition 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 subgroup positions outlined in the volunteer structure.

Assigning Volunteers to Roles Within the Structure

Access the Volunteer Group Assignments page (Contributor Relations > Initiatives > Volunteer Initiatives > Initiative Leadership > Volunteer Group Assignments). 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.

Image: Volunteer Group Assignments page

This example illustrates the fields and controls on the Volunteer Group Assignments page. You can find definitions for the fields and controls later on this 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 assign a volunteer to the required position or save anyway.

Creating Subgroup Assignments

Access the Sub-Group Assignments page (Contributor Relations > Initiatives > Volunteer Initiatives > Initiative Leadership > Sub-Group Assignment). 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.

Image: Sub-Group Assignments page

This example illustrates the fields and controls on the Sub-Group Assignments page. You can find definitions for the fields and controls later on this 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 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.

Related Links
Assigning Volunteers to Roles

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	Definition 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 (Contributor Relations > Initiatives > Volunteer Initiatives > Initiative Volunteers > Volunteer Assignments > Volunteer Assignments 1). 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.

Image: Volunteer Assignments 1 page

This example illustrates the fields and controls on the Volunteer Assignments 1 page. You can find definitions for the fields and controls later on this 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 select 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 (Contributor Relations > Initiatives > Volunteer Initiatives > Initiative Volunteers > Volunteer Assignments > Volunteer Assignments 2). This page enables you to assign individuals and groups to make contact with constituents. You can also rate volunteers on their effectiveness here.

Image: Volunteer Assignments 2 page

This example illustrates the fields and controls on the Volunteer Assignments 2 page. You can find definitions for the fields and controls later on this 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).

Related Links

Reviewing Volunteer History

This section discusses how to review volunteer history information.

Pages Used to View Volunteer History

Page Name	Definition 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.
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 Person Information, Constituent Information, 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.
Volunteer Assignment Detail	AV_VOL_ASGN_SP	• Click the linked name of a Volunteer Role on the Volunteer History inquiry page. • Click the linked name of a Volunteer Role on the Person Profile inquiry page.	Review detailed information about a volunteer's activity.

Page Name	Definition Name	Navigation	Usage
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 (Contributor Relations > Initiatives > Volunteer Initiatives > Volunteer History).

Search	Click to return all volunteer history records that fall within the time frame you selected.
Volunteer Group and **Volunteer Sub Group**	These columns display the group or subgroup to which the volunteer belongs.
Volunteer Role	Click the link 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.

Related Links

Viewing a Constituent's Audience History

Chapter 15

Managing Event Initiatives

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 Setting Up Event Initiatives.

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 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.

For more information about managing all types of initiatives, seeUnderstanding Initiative Management.

Managing Event 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 set of topics to manage the remaining event initiative-specific functionality, including setting goals and managing the details of the event.

See Understanding Event Initiative Management.

Preparing for Initiative Letters

Important! Mass Change is a deprecated product. Support will be maintained for this product, but no new development will be produced for Mass Change. It is strongly recommended that you use Application Engine instead. For more information on PeopleSoft Application Engine, see PeopleTools: Application Engine.

Campus Solutions 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). Select to process *Both* the trigger and mass change at the same time on the 3C Engine Parameters 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 3C Engine Parameters page, the system runs the mass change and also uses the trigger created to write the communication record.

Related Links
"Running the 3C Engine Process" (PeopleSoft Campus Solutions 9.2: Campus Community)
Understanding the Initiative Mass Change Template

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	Definition 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 (Contributor Relations > Initiatives > Event Initiatives > Manage Event Initiatives > Event Goals).

Upon entering this page, the Financial Goal and % Particptn Goal for the event appear. 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 Code	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.

Related Links
"Defining Campus Events" (PeopleSoft Campus Solutions 9.2: Campus Community)
"Creating an Event" (PeopleSoft Campus Solutions 9.2: Campus Community)

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.

Related Links
"Entering Meeting Details" (PeopleSoft Campus Solutions 9.2: Campus Community)

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.

Related Links

"Tracking Event Attendance" (PeopleSoft Campus Solutions 9.2: Campus Community)

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.

Related Links

"Creating an Event Template" (PeopleSoft Campus Solutions 9.2: Campus Community)

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.

Related Links

"Reviewing Events, Meetings, and Attendees" (PeopleSoft Campus Solutions 9.2: Campus Community)

Viewing a 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.

Related Links

Viewing To Do Lists

Chapter 16

Managing Other Initiatives

Understanding Other Initiatives

This section lists prerequisites and discusses other initiative management.

Prerequisites

Before you can manage a type of other initiative, you must have one set up. There are common initiative setup pages for this task.

See Understanding Initiatives.

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. Other initiatives provide 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.

Other initiatives are one type of initiative in Contributor Relations. Other initiative types share common management pages with all initiatives. Refer to the following topics for information about managing all types of initiatives.

Related Links
Understanding Initiative Management

Managing Other 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 set of topics to manage the remaining initiative-specific functionality.

See Understanding Initiative Management.

Related Links

Preparing for Initiative Letters

Setting Intermediate Goals

This section discusses how to set intermediate goals for an other initiative.

Page Used to Set Intermediate Goals

Page Name	Definition 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 (Contributor Relations > Initiatives > Other Initiatives > Manage Other Initiatives > Other Initiative Goals).

Image: Other Initiative Goals page

This example illustrates the fields and controls on the Other Initiative Goals page. You can find definitions for the fields and controls later on this page.

Upon entering this page the Financial Goal and Participation Goal for the initiative appear. 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.

Related Links

Viewing To Do Lists

Chapter 17

Entering Commitments

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 for Gifts and Pledges

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.
Search	Click to access the Search Criteria page where you can search for a donor.
	See <u>Searching for Records</u>.
📋	Click to paste a carried ID found using Search/Match functionality.
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 Understanding the Constituent Accumulators Process.

Managing Sessions

This section discusses how to:

• Initialize and balance a session.

• Select session defaults.

• View session detail and select transactions to edit or delete.

Pages Used to Manage Sessions

Page Name	Definition 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.

Page Name	Definition Name	Navigation	Usage
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 edit or delete them.
Session View	AV_BTCH_TREE_LIST	Contributor Relations > Session Management > Enter Gifts > Maintain Gift Sessions > Session View	View all details on all gifts in a session, using a single view.

Initializing and Balancing the Session

Access the Maintain Sessions page (Contributor Relations > Session Management > Enter Gifts > Maintain Gift Sessions > Maintain Sessions).

Image: Maintain Sessions page

This example illustrates the fields and controls on the Maintain Sessions page. You can find definitions for the fields and controls later on this 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.

Deposit Number	Enter a bank deposit number associated with this session. This field is informational only and is not tied to any processing; however, it can assist your institution during periodic bank statement reconciliation.
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 appear 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. The system sends an alert if some expected matching gifts have not been made.
Session Matching Gifts	Click to run a COBOL process that analyzes all of the gifts made and generates any expected matching gifts.

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.

Related Links

Reopening and Editing Expected Counts and Amounts for Sessions
Viewing Expected Matching Gifts

Selecting Session Defaults

Access the Session Defaults page (Contributor Relations > Session Management > Enter Gifts > Maintain Gift Sessions > Session Defaults). 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.

Image: Session Defaults page

This example illustrates the fields and controls on the Session Defaults page. You can find definitions for the fields and controls later on this 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.

Related Links

"Defining Contributor Relations User Defaults" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Viewing Session Details and Selecting Transactions to Edit or Delete

Access the Session Detail page (Contributor Relations > Session Management > Enter Gifts > Maintain Gift Sessions > Session Detail). Not only can you view session details here, but you can also select transactions to edit or delete.

Image: Session Detail page

This example illustrates the fields and controls on the Session Detail page. You can find definitions for the fields and controls later on this page.
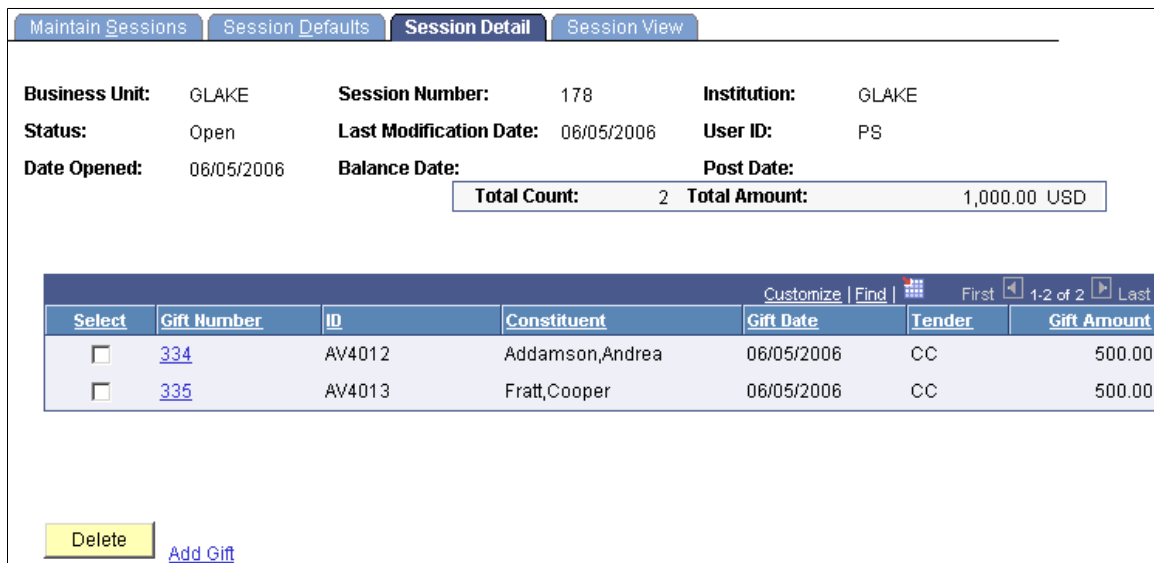
Information about the session appears, including a total count and amount of the transactions in the session.

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 is 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.

Viewing a Session Tree

Access the Session View page (Contributor Relations > Session Management > Enter Gifts > Maintain Gift Sessions > Session View). This page displays all details of all gifts in the session, using a tree view structure.

Image: Session View page

This example illustrates the fields and controls on the Session View page. You can find definitions for the fields and controls later on this page.

Session View Option	You can sort the tree view by: *Designation, Recognition, Tribute, Person Matching Gift,* or *Org Matching Gift.*
	You can also *Expand All* or *Collapse All* details of the session gifts, as well as expand or collapse details of each gift separately.

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 tender type details.

• Enter tribute details.

• Create soft gift entries.

• Identify potential matching gifts.

• Apply matching gifts.

• Receive a scheduled pledge.

- Update or add a constituent who is a person.

- Update or add a constituent who is an 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 Initializing and Balancing the Session.

2. Select session defaults using the Session Defaults page.

   See Selecting Session Defaults.

3. Enter transactions using the Gift Entry page.

   See Entering a Gift or Pledge Transaction.

4. Balance, queue, and post the session.

   See Queuing Sessions for PostingProcessing and Posting Sessions.

5. (Optional) View the accounting lines generated for the gift session.

   See Viewing Accounting Lines.

Pages Used to Enter Gifts and Pledge Payments

Page Name	Definition 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, gift-in-kind, or security detail information for gift or membership payments.

Page Name	Definition Name	Navigation	Usage
Tender Type Detail - Credit Card	AV_CC_PAYMENT_SP	Click the Tender Detail button on the Gift Entry, Membership Entry, Gift Adjustment, or Membership Adjustment page when the Tender Type is *CC.*	Enter detailed credit card information for gift or membership payments.
What is a security code?	SSF_SS_PMT_CVV	Click the What is a security code? link on the Tender Type Detail - Credit Card page.	Learn more about security codes in credit card transactions.
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.
External Org Matching Gifts (external organization matching gifts)	AV_MTCH_O_GIFT_SEC	Click the Matching Gifts button on the Gift Entry page.	Enter existing gifts to be matched, or instantly create a relationship with the organization and then create the matching 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.
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 > 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 or Pledge Transaction

Access the Gift Entry page (Contributor Relations > Session Management > Enter Gifts > Gift Entry).

Image: Gift Entry page

This example illustrates the fields and controls on the Gift Entry page. You can find definitions for the fields and controls later on this 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

Feed Gift

Clear this check box if you do not want to send the gift to the General Ledger. This check box is selected by default. This option is commonly used to record memo credits.

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 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 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 and displays 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.

Search

Click to access the Search/Match page where you can search for a donor.

See "Using Search/Match" (PeopleSoft Campus Solutions 9.2: Campus Community).

Click to paste a carried ID found using Search/Match functionality.

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 appear 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 during setup, you can enter a Gift Amount of zero. Otherwise, the gift amount must be greater than zero.

Depending on the tender type you select, click this button to enter its appropriate details on the Tender Type Detail page:

For *Check,* enter the Check Number on the page that appears.

For *Credit Card,* enter the constituent's credit card information on the page that appears.

If the credit card gift was mass loaded, the system populates address information, based on the Address Type field selected on the Mass Load Gift/Pledge page. Mass loaded credit card transactions are treated as though the user had entered the credit card gift online.

For *GIK,* enter the constituent's gift-in-kind details on the page that appears.

For *Security,* enter the description and details of the constituent's securities on the page that appears.

See Entering Tender Type Details.

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.

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 appears 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 appear 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 proceed, the system populates the Matching Gifts Page with its best guess at possible matches. If you do 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*. Click to access the External Org Matching Gifts page where you can enter existing gifts to be matched. You can also instantly create a relationship with the organization and then create a matching gift for the person.
	Important! You must assign designations and hard credit recognition prior to running the Matching Gifts process.
	See Viewing Matching Gifts for Organizations.
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 appear 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 appear 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.

See Creating Soft Gift Entries.

Tribute

You can enter information about tributes, which are gifts made in honor or in memory of someone. You cannot enter a tribute amount that exceeds the amount of the gift or pledge being entered.

When you enter a pledge payment on the Gift Entry page during gift entry, the system displays all available tribute information associated with the 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.
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 Entering Tribute Details.
	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.

Attachments

Click the View link to open the attachment in a new window. Click the Add Attachment button to upload a new attachment from within the component.

Related Links

Updating or Adding a Constituent Who is a Person
Updating or Adding a Constituent Who is an Organization

Creating Soft Gift Entries

This section discusses how institutions can enter soft dollar and soft credit-only gifts and pledges. These changes enable institutions to record gifts to the benefit of the donor.

Entering Soft Dollar Gifts and Pledges

The system allows you to make soft dollar gift entries that exceed the hard dollar gift or pledge amount. The system displays an informational warning, but still allows you to continue with the transaction.

In the Recognition group box on the appropriate gift or pledge page, you must enter a hard credit of *0* as well as the soft credit amount on zero-amount gifts only. If a gift of securities, for example, were being recognized with soft credit at a higher level than the hard credit amount, the hard credit would equal the gift amount.

Campus Solutions delivers two messages in the Message Catalog (PeopleTools > Utilities > Administration > Message Catalog) for this transaction:

Message Number	Message Text	Explanation	Condition to Appear
14305, 151	The amount for a recognition that is not the Hard Credit recognition is greater than the gift amount.	You have entered a recognition amount greater than the amount of the gift. You may save the gift as entered or correct the amount.	You enter a gift amount less than the soft credit amount.
14305, 152	The amount for a recognition that is not the Hard Credit recognition is greater than pledge amount.	You have entered a recognition amount greater than the amount of the pledge. You may save the pledge as entered or correct the amount.	You enter a pledge amount less than the soft credit amount.

Entering Soft Credit-Only Gifts and Pledges

You can enter soft credit-only gifts with a gift amount of zero. However, the tender type must be set up to allow zero-dollar gifts.

In the Recognition group box on the appropriate gift or pledge page, you can enter a soft credit value, up to 999 percent larger than the gift amount. If you enter soft credit in excess of 999 percent of the gift amount, the system displays an error message.

Campus Solutions delivers two messages in the Message Catalog (PeopleTools > Administration > Use > Message Catalog) for this transaction:

Message Number	Message Text	Explanation	Condition to Appear
14305, 153	Please reduce the Recognition Amount.	The Recognition Amount of the non-hard credit recognition exceeds 1000 percent of the Gift Amount.	You enter soft credit more than 999 percent of the hard credit gift amount.
14305, 154	Please reduce the Recognition Amount.	The Recognition Amount of the non-hard credit recognition exceeds 1000 percent of the Pledge Amount.	You enter soft credit more than 999 percent of the hard credit pledge amount.

Entering Tender Type Details

Access the Tender Type Detail page (Click the Tender Detail button on the Gift Entry, Membership Entry, Gift Adjustment, or Membership Adjustment page). This page changes depending on the tender type selected in the Special Fields field on the Tender Types setup page.

Check Number
If you selected *Check* as the tender on the Gift Entry page, enter the check number.

For mass loaded credit card gifts, the system populates the address information here based on the Address Type field selected on the Mass Load Gift/Pledge page. Mass loaded credit card transactions are treated as though the user had entered the credit card gift online.

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 Defining Credit Card Types.

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.

Security Code
Enter the security code as it appears on the credit card.

What is a security code?
Click this link to access an explanatory page explaining the reason for using a security code as well as its location on a 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.

For gift-in-kind tender details:

Gift Description   Enter a brief description of the gift-in-kind to be incorporated into the AVAK LetterGen.SQC so that it can be used in an acknowledgement.

Gift Purpose   Enter the reason for the gift and how it will be used.

Estimated Value   Enter an educated guess of the value of the gift. This field is used for reporting purposes only; it is not included in the AVAK LetterGen.SQC, as it is the donor's responsibility to accurate declare the gift's value.

Written Appraisal   Select this check box when a written appraisal is received with the gift-in-kind.

Appraised Value   Enter the valued amount of the gift-in-kind, as determined by an external appraiser.

Appraisal Date   Enter the date that the appraisal was made.

For securities tender type details, on the Security Information 1 tab:

Gift Description   Enter a brief description of the security to be incorporated into the AVAK LetterGen.SQC for it to be used in an acknowledgement.

Stock/Security Name and **Symbol** Enter the name and trading symbol for the company whose stock has been given.

Number of Shares   Enter the number of shares of the stock or security being transferred to the institution as a gift.

Estimated Value   Enter an educated guess of the value of the gift or the average of the Day Low/Day High or Ask/Bid for the day on which the stock is determined to be transferred to the institution. This field is included in the AVAK LetterGen.SQC for use in the Acknowledgement template.

The Stock/Security Name carries over from the Security Information 1 tab.

For securities tender type details, on the Security Information 2 tab:

Day Low/Ask   Enter the lowest amount at which the stock/security traded on the day of transfer or, if no trades occurred, the Ask amount as reported by the stock exchange.

Day High/Bid	Enter the highest amount at which the stock/security traded on the day of transfer or, if no trades occurred, the Ask amount as reported by the stock exchange.
Public	Select this check box if the stock is publicly traded.

Related Links
Loading Gifts and Pledges

Entering Tribute Details

Access the Tribute page (Click the Notify link on the Gift Entry page). You enter tribute information on the Gift Entry and Pledge Entry pages, and enter tribute specifics and notifications on this 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 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 for person gifts (Click the Matching Gifts button on the Gift Entry page). You have the choice of using this page to create matching gifts one at a time, or you can run a cleanup process on the Maintain Gift Sessions page to look for all matching gifts in the session, including those you may be unaware of.

When you click the Matching Gifts button on the Gift Entry page, a dialog box appears 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.
Processed 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.

Related Links

Managing Sessions

Applying Matching Gifts

Access the Ext Org Matching Gifts page for organization gifts (Click the Matching Gifts button on the Gift Entry page).

Image: External Org Matching Gifts page

This example illustrates the fields and controls on the External Org Matching Gifts page. You can find definitions for the fields and controls later on this 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. You can also enter new IDs to create new matching gifts. If no relationship exists between the person and organization, click the Organization Relationship link to access the Org/Person Relationships page to instantly create one. You can then return to this page and create the new matching gift.

Outstanding Gifts to be Matched

ID	Select the check box for the gift that is being matched by the organization's matching gift payment.

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.

New Gifts Being Matched

The fields in this group box are similar to the ones above, but here you can create both an expected match and an organization matching gift at the same time. This is beneficial when an expected match is not yet on file in the system before the institution receives the matching amount.

ID	You can search for and select any ID that has an existing relationship with the organization.

If you want to create a new gift for an ID that has no current relationship defined with the organization, click the Organization Relationship link to instantly create a relationship. When you click the OK button, the system moves the ID up to the Outstanding Gifts to be Matched group box and you can then match the gift.

Receiving a Scheduled Pledge

Access the Pledge Schedule page (Click the Pledge Schedule link on the Gift Entry 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 (Contributor Relations > Constituent Information > People > Add/ Update a 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 appears 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 (Contributor Relations > Constituent Information > Organizations > Update 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	Definition 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. You can also load credit card gifts through the mass load process.

Because of the many variances between financial institutions and their databases, Campus Solutions 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:

Image: How GP Load might fit into a lockbox process at your institution

This graphic illustrates an example of how GP Load might fit into a lockbox process at your institution:
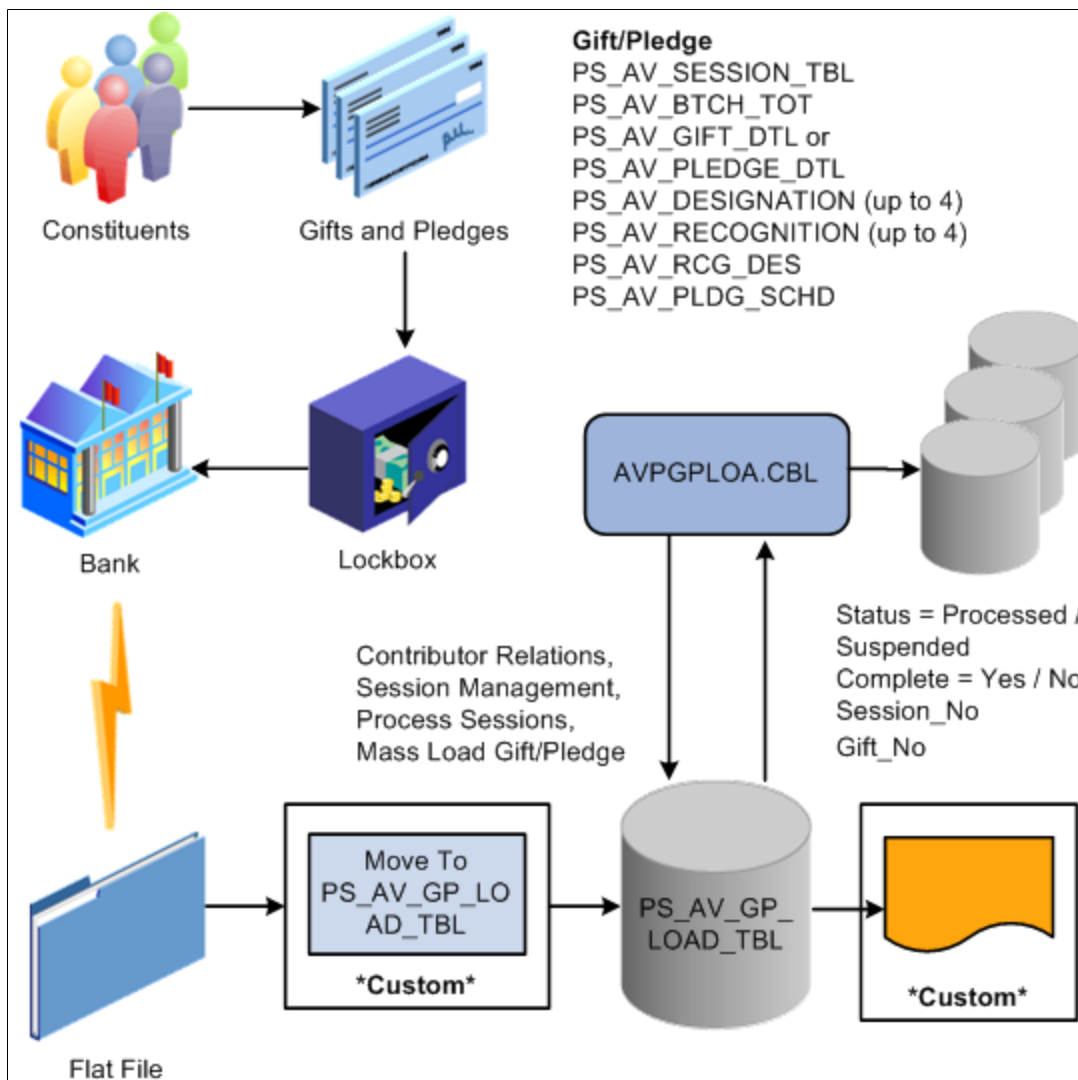
Access the Mass Load Gift/Pledge page (Contributor Relations > Session Management > Process Sessions > Mass Load Gift/Pledge).

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.
Address Type	Select which address to use when loading the transaction.
	For credit card transactions, CyberSource requires an address to be attached to the credit card information before it can process the transaction. During the AVPGPLOA process, for any record where the tender type = *CC,* the process takes the address for each record, for the address type selected on the run control page, and stores it in the AV_EP_GIFT_DTL record.

| 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.

The AV_GPLOAD_CC Application Engine process does the following when loading mass credit card gifts:

1. Encrypts the credit card information entered when it is loaded into sessions.

2. Truncates the credit card number in the AV_GP_LOAD_TBL to the last four digits.

Process Scheduler runs the Mass Load Gift/Pledge process at user-defined intervals.

Important! It is highly recommended that the Mass Load Gift/Pledge process be run immediately after loading the AV_GP_LOAD_TBL with credit card gifts. These steps reduce the exposure of credit card data in your system.

Related Links
Data Field Details

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	Definition 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.

Page Name	Definition Name	Navigation	Usage
Recognition Detail	AV_RECG_DTL_SP	• You can access the Recognition Detail page through multiple navigation paths. The most frequently used path follows: • 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.
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 (Contributor Relations > Session Management > Supervise Sessions > Gift Sessions > Gift Summary).

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.

Related Links
Entering a Gift or Pledge Transaction

Viewing Gift Details

Access the Gift Detail page.

Grids on this page display designation, recognition, tribute, and matching gifts details. This eliminates the need to access separate, multiple pages to view this information. In addition, the Designation Code field appears.

The Tender Type field displays the tender type details for the gift, from the Gift Entry page. Users with security access can edit any details for the tender type that are not related to GL processing.

Note: In the Tender Details group box, the credit Card Type appears, but not the cardholder's name. The system also masks the Card Number and only displays its last four digits.

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.

Related Links

Entering a Gift or Pledge Transaction

Adjusting Gifts and Matching Gifts

This section provides an overview of gift adjustment and discusses how to

- Select a transaction to adjust.

- Enter a gift adjustment transaction.

- Adjust matching gift information.

- Edit matching gift information.

- Change a gift's type.

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 Initializing and Balancing the Session.

2. Select session defaults using the Session Defaults page.

    See Selecting Session Defaults.

3. Select the existing posted transactions to adjust using the Session Detail page.

    See Viewing Session Details and Selecting Transactions to Edit or Delete.

4. Make the necessary changes to transactions using the Gift Adjust page.

    See Entering a Gift Adjustment Transaction.

5. Balance, queue, and post the session.

    See Initializing and Balancing the SessionQueuing Sessions for PostingProcessing and Posting Sessions.

Page Used to Adjust Gifts and Matching Gifts

Page Name	*Definition 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 select a gift or pledge to adjust.

See Viewing Session Details and Selecting Transactions to Edit or Delete.

Entering a Gift Adjustment Transaction

Access the Gift Adjust page (Contributor Relations > Session Management > Enter Gifts > Gift Adjustment).

Important! The original transaction must be posted before you can adjust it.

Image: Gift Adjust page

This example illustrates the fields and controls on the Gift Adjust page. You can find definitions for the fields and controls later on this 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 appear on this page.

Currency Code	Fields That Appear	Fields That Disappear
Your Business Unit's Base	None	Display in Other Currency button
		Base Amt
Any Other Currency	Display in Other Currency button	None
	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.

Recognition

In this group box, you can enter soft-dollar gifts and soft credit-only gifts.

Attachments

Click the View link to open the attachment in a new window. Click the Add Attachment button to upload a new attachment from within the component.

Related Links

Entering a Gift or Pledge Transaction
Creating Soft Gift Entries

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 (Click the Matching Gifts button on the Gift Adjust 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 clear 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. Clear 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, reize, and recapture 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:

Image: Gift and membership credit card transaction adjustment process for previously authorized or captured transactions

This graphic illustrates the gift and membership credit card transaction adjustment processes for previously authorized or captured transactions:
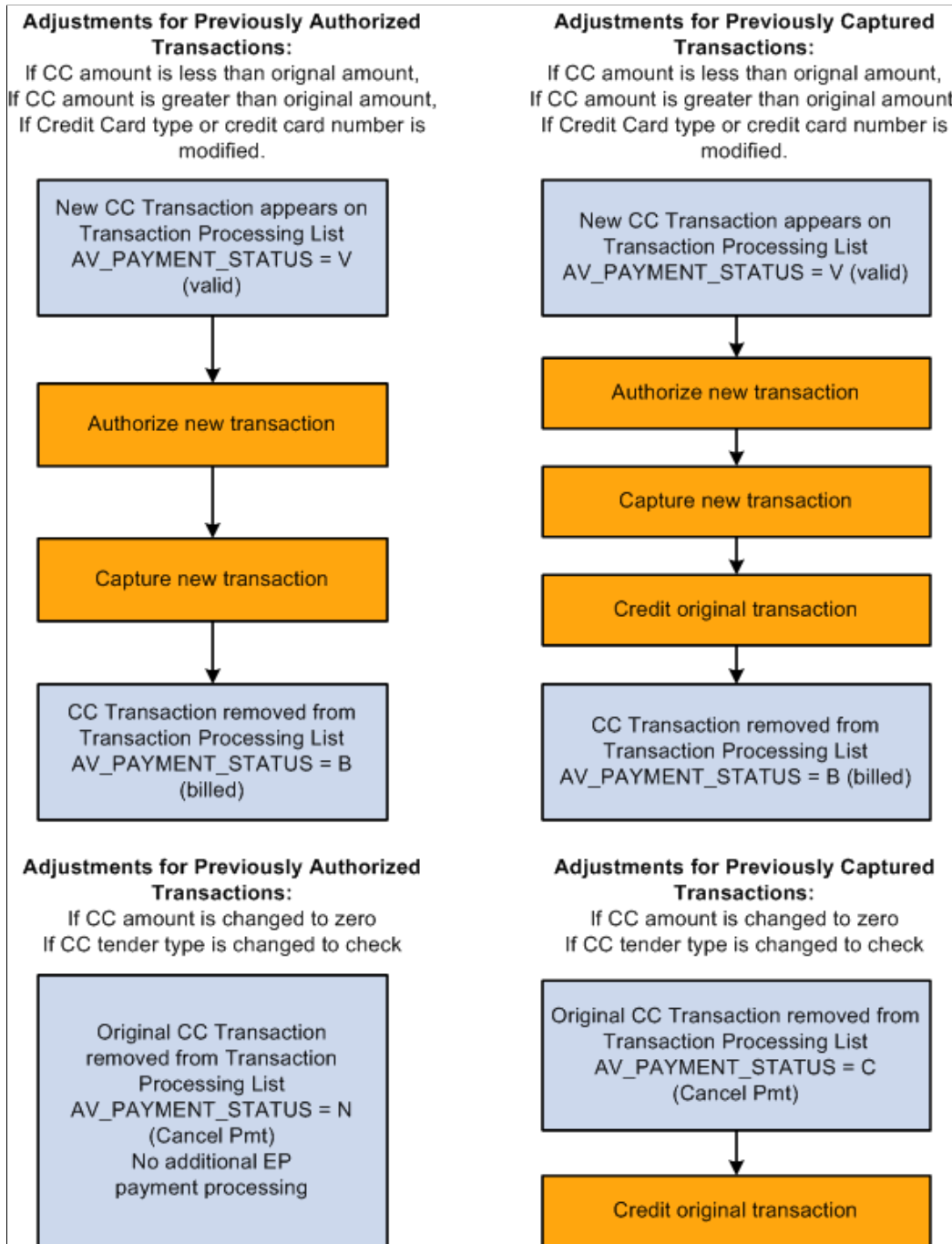
Related Links
Adjusting Gifts and Matching Gifts
Processing Credit Card Transactions

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 appear 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	*Definition 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	Definition 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 (Contributor Relations > Session Management > Enter Pledges > Conditional Pledges > Conditional Pledges > Cond Pledge Entry).

Image: Cond Pledge Entry page

This example illustrates the fields and controls on the Cond Pledge Entry page. You can find definitions for the fields and controls later on this 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 (Contributor Relations > Session Management > Enter Pledges > Conditional Pledges > Conditional Pledges > Cond Pledge Designations).

Image: Cond Pledge Designations page

This example illustrates the fields and controls on the Cond Pledge Designations page. You can find definitions for the fields and controls later on this 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 appear 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 appear 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 appears in the Amount field.

Alternatively, enter an amount of the donation or pledge to allocate to this designation. When you enter an amount, the percentage of the gift or pledge equaling that amount appears in the Pct field.

Assigning Conditional Pledge Recognition

Access the Cond Pledge Recognition page (Contributor Relations > Session Management > Enter Pledges > Conditional Pledges > Conditional Pledges > Cond Pledge Recognition).

Image: Cond Pledge Recognition page

This example illustrates the fields and controls on the Cond Pledge Recognition page. You can find definitions for the fields and controls later on this 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 "Defining Contributor Relations User Defaults" (PeopleSoft Campus Solutions 9.2: Application Fundamentals).

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 appears 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 appears 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 Initializing and Balancing the Session.

2. Select session defaults using the Session Defaults page.

   See Selecting Session Defaults.

3. Enter transactions using the Pledge Entry page.

   See Entering Pledges.

4. Balance, queue, and post the session.

   See Entering PledgesQueuing Sessions for PostingProcessing and Posting Sessions.

5. (Optional) View the accounting lines generated by the pledge, if the pledge was fed to the general ledger.

   See Viewing Accounting Lines.

Pages Used to Enter Pledges

Page Name	Definition 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 (Contributor Relations > Session Management > Enter Pledges > Pledge Entry).

Image: Pledge Entry page

This example illustrates the fields and controls on the Pledge Entry page. You can find definitions for the fields and controls later on this 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 appear 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 appear 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 appear 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.

See Creating Soft Gift Entries.

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 Entering Tribute Details.

Attachments

Click the View link to open the attachment in a new window. Click the Add Attachment button to upload a new attachment from within the component.

Determining a Pledge Payment Schedule Within a Session

Access the Pledge Schedule page (Contributor Relations > Session Management > Enter Pledges > Pledge Entry > Pledge Schedule).

Image: Pledge Schedule page

This example illustrates the fields and controls on the Pledge Schedule page. You can find definitions for the fields and controls later on this 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 appears.

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 appears 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 (Contributor Relations > Session Management > Enter Pledges > Pledge Schedules > Pledge Schedule).

Image: Pledge Schedule page

This example illustrates the fields and controls on the Pledge Schedule page. You can find definitions for the fields and controls later on this 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. |

Related Links

Determining a Pledge Payment Schedule Within a Session

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's pledge summary.

• View an open pledge register.

• View a pledge payment schedule.

Pages Used to View Pledges

Page Name	Definition 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 (Contributor Relations > Session Management > Supervise Sessions > Pledge Sessions > Pledge Summary).

If the session you select is open, the pledge number, ID and constituent name, first payment date, fulfillment date, and gift amount appear 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.

Related Links
Viewing a Supervisor's Pledge Summary
Entering a Pledge Transaction

Viewing Pledge Details

Access the Pledge Detail page (Click the Details button on the Pledge Summary page).

Grids on this page display designation, recognition, and tribute details. This eliminates the need to access separate, multiple pages to view this information. In addition, the Designation Code field 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 appear for each transaction in the session you selected.

Related Links
Entering a Pledge Transaction

Viewing an Open Pledge Register

Access the Open Pledge Register page (Contributor Relations > Analyze Giving History > Person Giving Summaries > Open Pledge Register).

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 (Contributor Relations > Analyze Giving History > Person Giving Summaries > Pledge Schedule).

| **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.

Related Links

Determining a Pledge Payment Schedule Within a Session

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 Understanding the Gift and Pledge Process.

To adjust pledge transactions:

1. Initialize a session with the type of Adjust Pledge, using the Maintain Pledge Sessions page.

   See Initializing and Balancing the Session.

2. Select session defaults using the Session Defaults page.

   See Selecting Session Defaults.

3. Select the existing transactions to adjust using the Session Detail page.

   See Viewing Session Details and Selecting Transactions to Edit or Delete.

4. Make the necessary changes to transactions using the Pledge Adjust page.

   See Entering a Pledge Adjustment Transaction.

5. Balance, queue, and post the session.

See <u>Queuing Sessions for PostingProcessing and Posting Sessions</u>.

Pages Used to Adjust Pledges

Page Name	Definition 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.

Related Links

<u>Determining a Pledge Payment Schedule Within a Session</u>

Entering a Pledge Adjustment Transaction

Access the Pledge Adjust page (Contributor Relations > Session Management > Enter Pledges > Pledge Adjustment > Pledge Adjust).

Image: Pledge Adjust page

This example illustrates the fields and controls on the Pledge Adjust page. You can find definitions for the fields and controls later on this 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.

Recognition

In this group box, you can enter soft-dollar pledges and soft credit-only pledges.

Attachments

Click the View link to open the attachment in a new window. Click the Add Attachment button to upload a new attachment from within the component.

Related Links

Entering a Pledge Transaction
Creating Soft Gift Entries

Chapter 18

Processing Commitments

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 capture (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 capture.

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

User	Access Page
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 using 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.

Related Links
Understanding Involvement

Common Elements Used for Credit Cards

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.

Search   Click to access the Search/Match page where you can search for a donor.

                                     See Searching for Records.

📋   Click to paste a carried ID found using Search/Match functionality.

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	*Definition 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 (Contributor Relations > Session Management > Queue Sessions for Posting).

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 job.

• Run the GL interface file extract process.

• Run the Constituent Accumulators process.

• 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 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 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 using Integration Broker.

     The Journal Generator process is run within Financials to create journal entries.

     See Understanding the Interface.

   • 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.

Related Links
Setting Up Item Types

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 subroutine.

2. After the subroutine (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

The system 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, creating 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. Similarly, 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 does not generate any 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 using 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 nonaccumulated 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, nonaccumulated 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 Service Operations Monitor 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 nonzero, nonprocessing 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.

The following graphic illustrates the Constituent Accumulators process flow, from the person or organization's matching gift or pledge schedule, through to the person or organization's commitment summary, including all of the tables affected during processing:

Image: Constituent Accumulators process flow

This graphic illustrates the Constituent Accumulators process flow in the Contributor Relations system:
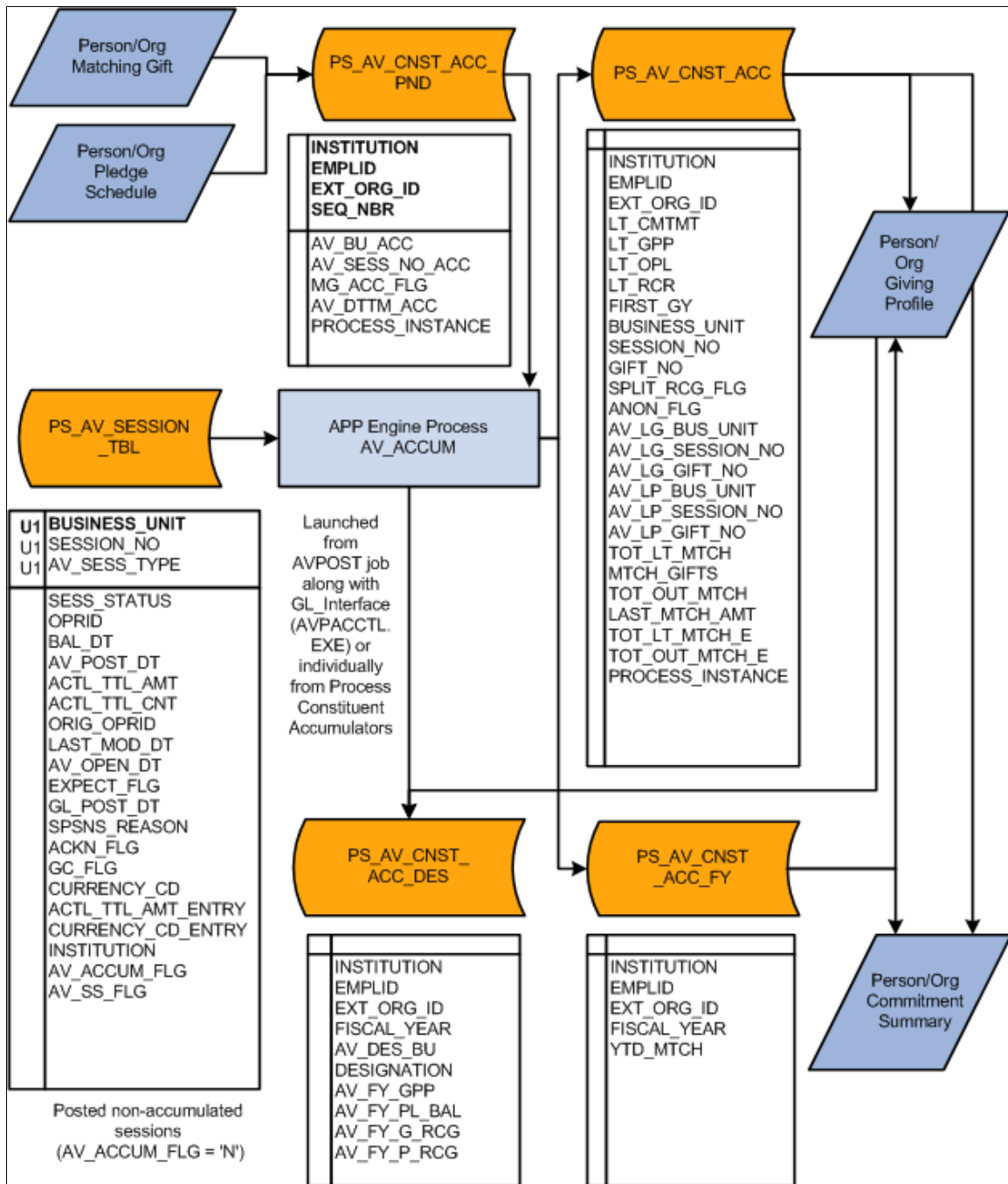
Pages Used to Process and Post Sessions

Page Name	Definition 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.

Page Name	Definition Name	Navigation	Usage
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 (Contributor Relations > Session Management > Process Sessions > G/L Interface).

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 Preparing for Session Posting.
Commit Level	Determine how many sessions are 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.

Related Links

Running the AVPOST2 Job

Running the GL Interface File Extract COBOL Process (AVPACCTL)

Access the GL Interface File Extract page (Contributor Relations > Session Management > Process Sessions > G/L Interface File Extract).

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.

Running the Constituent Accumulators Process (AVPOST)

Access the Constituent Accumulators page (Contributor Relations > Session Management > Process Sessions > Constituent Accumulators).

If you process sessions using the AVPOST multi-process job, the system runs the processes automatically as part of that routine. If you 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 *PeopleSoft FSCM: General Ledger*

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.

- Capture gift and membership transactions.

- Authorize and capture transactions as a single process.

- Handle denied CyberSource transactions.

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.

- Capture

  Confirms the temporary hold placed on credit card funds after a transaction has been authorized and bills the credit card.

- Authorize and Capture

  Combines transaction authorization and capture 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*.

Status Value	Definition
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 capture a gift or membership transaction is to have an AV_PAYMENT_STATUS value of A.
B (captured)	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 captured, 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 captured, 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.
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.

Image: Summary of electronic payment transaction processing

This graphic provides a summary process flow for electronic payment transaction processing:
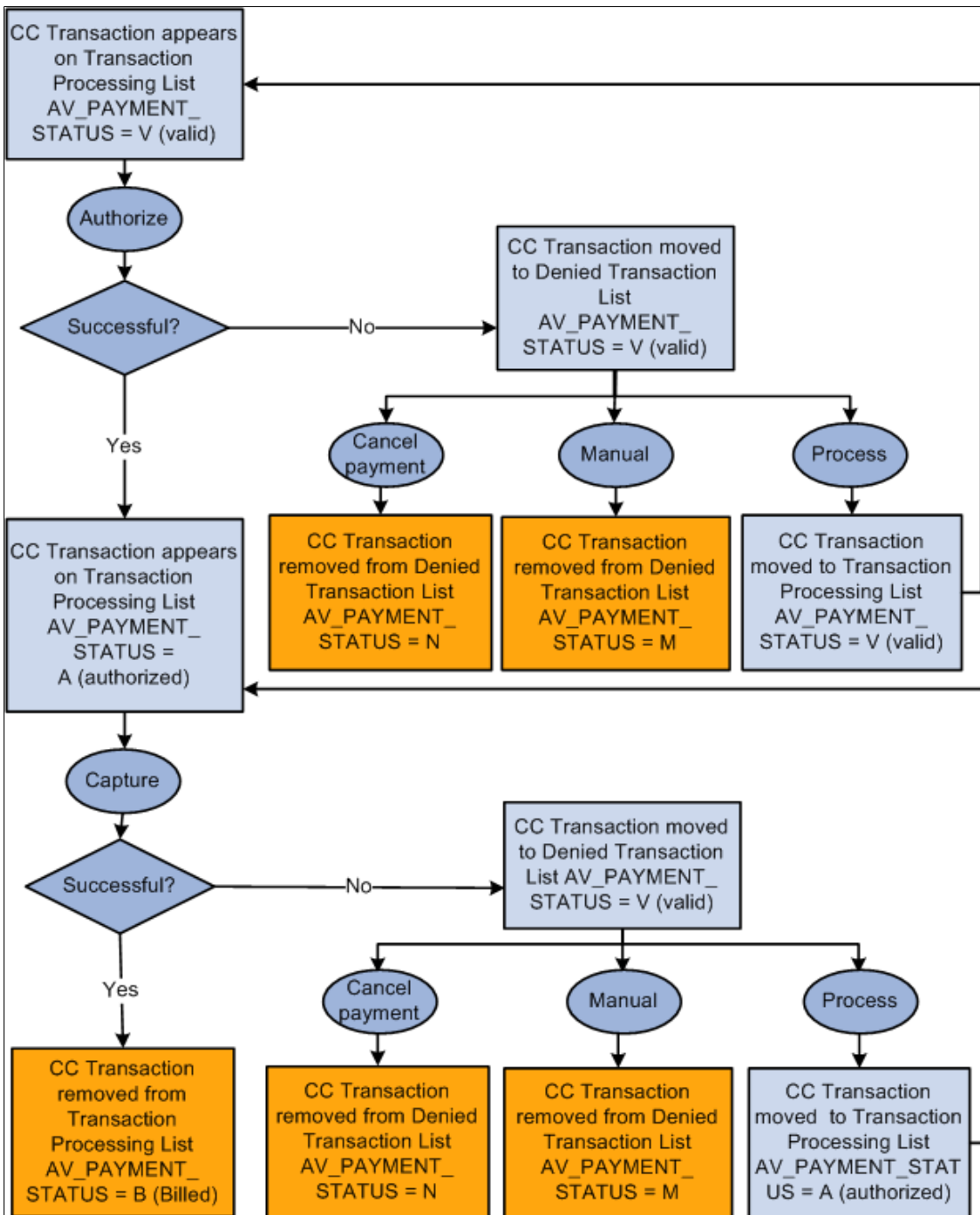
Pages Used to Process Credit Card Transactions

Page Name	Definition 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 (Contributor Relations > Session Management > Process Electronic Payments > EP Transaction Processing).

Image: EP Transaction Processing - Filter Options page

This example illustrates the fields and controls on the EP Transaction Processing - Filter Options page. You can find definitions for the fields and controls later on this page.

Institution   Enter an institution code.

Business Unit   Enter a business unit for the gift or membership transactions to
                                  process. This field cannot be left empty because Transaction
                                  Requested field values are dependent on the business unit
                                  specified.

	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, Capture, Authorize and Capture,* 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.

Related Links

Authorizing Gift and Membership Transactions
Capturing Gift and Membership Transactions

Adjusting Gift and Membership Credit Card Payments

Authorizing Gift and Membership Transactions

Access the EP Transaction Processing - Transaction List page (Click the Search button on the EP Transaction Processing - Filter Options 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 gives details of all existing transaction processing information.
	See Understanding Credit Card Transaction Processing.
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:

Image: EP Transaction Processing - Transaction List message (AV_EP_G_PROC)

This example illustrates the fields and controls on the EP Transaction Processing - Transaction List message (AV_EP_G_PROC). You can find definitions for the fields and controls later on this page.

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.

Related Links

Working with Denied Credit Card Transactions
Adjusting Gift and Membership Credit Card Payments
Selecting Gift and Membership Transactions for Processing

Capturing 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 capture 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 *Capture*.

Note: All gifts made through PeopleSoft Involvement self-service pages enter the system at this stage, authorized and ready to be captured.

After the system captures 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*.

Related Links

Selecting Gift and Membership Transactions for Processing
Authorizing Gift and Membership Transactions

Authorizing and Capturing Transactions as a Single Process

Instead of authorizing and capturing 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 capturing are considered separate transactions. If you authorize and capture in a single succession, use a single transaction to authorize/capture.

If you decide to authorize and capture 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 capturing separately. However, when you use these pages, you must filter and process the transactions with a Transaction Requested field value of *Authorize and Capture.*

After the system successfully authorizes and captures a transaction in a single succession, its status becomes *B*.

Related Links

Selecting Gift and Membership Transactions for Processing
Authorizing Gift and Membership Transactions
Capturing Gift and Membership Transactions

Handling Denied CyberSource Transactions

Here is some additional information about handling denied CyberSource transactions:

1. If the EP Process receives a returned message indicating an E-System error, an error has occurred after the PeopleSoft-to-credit-card-merchant connection.

   In this instance, the transaction is denied but is unavailable for reprocessing through the Denied Transactions component.

2. This does not stop the process from continuing for subsequent valid transactions in the same process run.

3. Contact the donor, because the transaction failed outside of the PeopleSoft/CyberSource connection. For example, the transaction was denied by the donor's bank.

Purging Credit Card Security Data

This section discusses how to purge security codes from the system associated with gift and membership transactions.

Understanding Credit Card Security Code Purging

Credit card security codes are retained until after the transaction is authorized. In real-time transactions, the security code record is deleted immediately after the self-service transaction is authorized. However, if the payment merchant is set up to perform batch authorizations, there could be a delay between the time

that sessions containing transactions are submitted and when they are authorized. The Purge Gift Security Codes and Purge Membership Security Codes pages enable you to ensure the timely deletion of this data and remain PCI compliant.

Pages Used to Purge Credit Card Security Data

Page Name	Definition Name	Navigation	Usage
Purge Gift Security Codes	AV_RUN_CVPURGE	Contributor Relations > Session Management > Process Electronic Payments > Purge Gift Security Codes	Periodically purge credit card security codes from the system that are associated with gifts.
Purge Membership Security Codes	AV_RUN_CVPURGE	Contributor Relations > Session Management > Process Electronic Payments > Purge Member Security Codes	Periodically purge credit card security codes from the system that are associated with membership payments.

Purging Security Codes for Gifts and Memberships

Access the Purge Gift Security Codes or Purge Membership Security Codes page.

The fields on each page are the same for both gift and membership security code purges.

The fields in the Purge Cutoff Date group box enable you to periodically purge gift or membership security codes from your system. The cutoff date is calculated by subtracting the days, hours and minutes from the current system date and time, and any transaction with a date/time earlier than that is deleted.

Click the Run button to launch Process Scheduler and run the AV_CVVPURGE Application Engine process, which removes security codes from the AV_EP_PMT_CVV record that:

• Exceed the retention maximum days, hours and minutes, irrespective of whether they are authorized or not.

• Have been authorized, yet somehow were not purged by AV_EP_BATCH after the credit card transaction was authorized.

Reviewing Electronic Payment Results

This section discusses how to:

• Prepare to run the Electronic Payment (EP) processing audit.

• Generate the EP Processing Audit report.

• View EP processing audit information online.

Pages Used to Review Electronic Payment Results

Page Name	Definition Name	Navigation	Usage
EP Run Review	AV_EP_RUN_DETAIL	Contributor Relations > Session Management > Process Electronic Payments > EP Run Review	Enter run parameters and generate the EP Processing Audit report (AV704).
EP Run Review - Transaction List	AV_EP_TRAN_RUN_LOG	Click the Process Instance link on the EP Run Review page.	View process instance and reference number details for a transaction.

Preparing to Run the EP Processing Audit

Before you can generate the AV704 report, you must:

1.   Enter credit card gifts or membership payments on the Gift Entry or Membership Entry pages.

2.   Balance, queue, and post those gift or membership sessions.

3.   Submit a request to process the credit card transactions using the EP Transaction Processing page.

Generating the EP Processing Audit Report

Access the EP Run Review page (Contributor Relations > Session Management > Process Electronic Payments > EP Run Review).

Image: EP Run Review page

This example illustrates the fields and controls on the EP Run Review page. You can find definitions for the fields and controls later on this page.

When you run the process, the system generates the AV704 report. Each electronic payment Transaction Requested status begins a new page, and the last page provides total transaction amounts.

EP Processing Audit

You can enter a Process Instance number to use for this report, or click the button at the end of a Process Instance row to copy that instance's information into the fields of the group box.

Filter Options

The Filter by Operator ID field is available if you have gift or membership supervisor security status in the system.

Process Details

Process Instance	Click a numbered link to access the EP Run Review – Transaction List page, where you can review more details about the transactions processed in this instance.
Request Status	Values for this field are *Success* and *Exception.* An exception status means that at least one transaction in the instance did not return with the status you requested.
Delete	After selecting one or more process instances, click this button to remove them from the list of transactions used to generate the report.
☑ and ☐	Click the first button to select all process instances in the grid. Click the second button to clear checked instances.

Related Links
Contributor Relations Reports: A to Z

Viewing EP Processing Audit Information Online

Access the EP Run Review - Transaction List page (Click the Process Instance link on the EP Run Review page). This page provides an online view of the same information contained in the AV704 report.

The List tab provides information about how the electronic transaction was handled during processing. Click the Reference Number link to access the Reference Number List view of the page, which displays a history of the reference number and previous attempts to work with the transaction.

The Detail tab provides information about the transaction itself and displays details about what was entered.

In the Reference Number list, click the Payment Status link to access the AV_EP_TRANS_SP page, where you can view system action details that relate to this transaction.

Related Links
Selecting Gift and Membership Transactions for Review

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 capture denied gift and membership transactions.

Understanding Denied Credit Card Transactions

When you attempt to authorize or capture 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 capture, authorize and capture, 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	Definition 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 capture 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 (Contributor Relations > Session Management > Process Electronic Payments > EP Denied Transactions).

Image: EP Denied Transactions - Filter Options page

This example illustrates the fields and controls on the EP Denied Transactions - Filter Options page. You can find definitions for the fields and controls later on this page.

Use this page in the same way that you select gifts and memberships for authorization and capture; 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, capture, combined authorization/capture, or credit.

Related Links

Selecting Gift and Membership Transactions for Processing

Authorizing and Capturing Denied Gift and Membership Transactions

Access the EP Denied Transactions - Transaction List page (Click the Search button on the EP Transaction Processing - Filter Options page).

Note: To authorize, on the EP Denied Transactions - Filter Options page set Transaction Requested to *Authorize.* To capture, set Transaction Requested to *Capture.*

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 capturing 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, capture, authorize and capture, 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 handle a transaction manually, you must perform all subsequent actions manually, such as authorization, validation, or capture.

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.

Related Links

Authorizing Gift and Membership Transactions
Capturing Gift and Membership Transactions

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.

• Review credit card processing messages.

Pages Used to Review Credit Card Activity

Page Name	Definition 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.

Page Name	Definition Name	Navigation	Usage
EP Transaction Processing - Transaction List	AV_EP_G_PROC	Contributor Relations, Session Management, EP Transaction Processing	View the results of the EP transaction process using the Process Monitor.

Selecting Gift and Membership Transactions for Review

Access the EP Transaction Log Inquiry - Filter Options page (Contributor Relations > Session Management > Process Electronic Payments > EP Transaction Log Inquiry).

Image: EP Transaction Log Inquiry - Filter Options page

This example illustrates the fields and controls on the EP Transaction Log Inquiry - Filter Options page. You can find definitions for the fields and controls later on this page.

The fields on this page are similar to those on the EP Transaction Processing - Filter Options page used to initially authorize, capture, authorize/capture, 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).

Related Links
Selecting Gift and Membership Transactions for Processing

Reviewing Gift and Membership Transactions

Access the EP Transaction Log Inquiry - Transaction List page (Click the Search button on the EP Transaction Log Inquiry - Filter Options page).

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	Click the link to view system action details that relate to this transaction.
Credit Card Message 1	Displays the resulting response message from the third-party credit card processor.

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.

Image: Example of AV_EP_TRANS_SP page for a transaction

This example illustrates the fields and controls on the Example of AV_EP_TRANS_SP page for a transaction. You can find definitions for the fields and controls later on this page.

Reference Number:	000000000000002	Gift Number:	
Sequence number:	1	Member Payment:	
Transaction Date:	11/17/2009	ID:	KU0007
Business Unit:	MEDBU		
Session Number:		Gift Amount:	345.00 USD
Tender Type:	CC	Dues Amount:	USD
Payment Status:	Authorized	Sequence Number:	1
Credit Card Type:	VISA		
Credit Card Number:	*******************************Last Four Digits:		1111
Expiration Date:	01 / 2010		
Credit Card First Name:	Betty		
Credit Card Last Name:	Locherty		
Service Provide:	Cybersource		
Credit Card Request ID:	2585137275320008430595		
Request Token:	Ahj/7wSRGEf5HoS8I6gGIkGzhkyauXDRqxsV4TlvRTdx5yrvACm7jzl XeNIIQ2JI0wyW6YBay4guBORGEf5HoS8I6gGAwI54		
Authorization Datetime:	2009-11-17-19.08.47.		
Return Status:	0		
Authorization Reply:	SUCCESS		
Transaction Reference Number:			
Authorization Code:	888888	Auth Date:	11/17/2009
AVS Code:	X		
Return Message:	Transaction was successful.		
Country:	USA		
Address Line 1:	643 Robinson St		
Address Line 2:			
Address Line 3:			
City:	Buffalo		
State:	NY	Postal Code:	74940
Last Update Date/Time:	11/17/09 7:08:47PM		
Last Update User ID:	PS		
Process Instance:			

The Request Token field appears on this page. The Last Update Date/Time, Last Update User ID, and Process Instance fields are also on this page.

When your institution submits an initial credit card transaction request to CyberSource, then follows it with a separate request later, you must supply a request token with the second request. CyberSource generates and sends this token in its reply to any service request. For example, if you authorize a transaction and you later submit a follow-up request to capture it (not an auth/capture request), the process must provide CyberSource with this request token when you submit the capture request.

Reviewing Credit Card Processing Messages

When you run the Application Engine process that sends credit card transactions to a CR merchant for credit card processing, you can click the PeopleSoft Process Monitor (Process Monitor > Details > Message Log) link on that page to view the job status and the messages that the system sends during the process.

The system displays a message on this PeopleTools page for each declined transaction. In addition, if your CR merchant for credit card processing is set up for tracing, the system displays messages for all transactions, regardless of their status. To set up a merchant for service provider tracing, select the appropriate value in the Credit Card Tracing field on the CR Merchants page (Set Up SACR > Product Related > Contributor Relations > Session Management > Merchant Table).

Click the Explain button beside a message on the Message Log to access a PeopleTools Explain page where you can learn more about the message.

The Description portion of the page enables you to decode the message. For example, here is the meaning of the message "Decline MEDBU.1.M.162.52 101" :

- *Decline:* the return status message. In this case, the third-party processor declined the transaction.

- *MEDBU.1.M.162.52:* the merchant reference breaks down as follows:

  - MEDBU is the business unit associated with the transaction.

  - 1 is the service requested code. Code 1 = authorization, 2 = authorize and capture, 3 = capture, and 4 = credit.

  - M is the session type of membership, membership adjustment, gift, or gift adjustment.

  - 162 is the system-generated number of the gift or membership session.

  - 52 is the gift or membership payment number.

- *101:* the return status message provided by the third-party processor.

See *PeopleTools: Process Scheduler*

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	Definition 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 (Contributor Relations > Session Management > Supervise Sessions > Accounting Line Summary).

Image: Accounting Line page

This example illustrates the fields and controls on the Accounting Line page. You can find definitions for the fields and controls later on this 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 Financials 8.4 and 8.8. The GL Interface process currently populates the following fields:

• Fund

• Alternate Account

• Budget Reference

• Chartfield 1

• Chartfield 2

• Chartfield 3

Related Links

Reviewing Accounting Lines
Understanding the Interface

Viewing Suspended Sessions

This section discusses how to view information about suspended sessions.

Page Used to View Suspended Sessions

Page Name	Definition 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 (Contributor Relations > Session Management > Supervise Sessions > Suspended Sessions).

When you post gift and pledge sessions, the system displays any sessions that were suspended for any reason on this page. You can reopen 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 Contributor Relations 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
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 reopen the session for editing. After reopening 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.

• Reopen and edit expected counts and amounts for sessions.

Pages Used to View Information About and Transfer Sessions

Page Name	Definition 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 (Contributor Relations > Session Management > Supervise Sessions > Session Summary > Session Filter).

Image: Session Filter page

This example illustrates the fields and controls on the Session Filter page. You can find definitions for the fields and controls later on this 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 appear 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 appear 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 (Contributor Relations > Session Management > Supervise Sessions > Session Summary > Session Summary).

Image: Session Summary page

This example illustrates the fields and controls on the Session Summary page. You can find definitions for the fields and controls later on this page.

If you are a Gift and Pledge Supervisor, you can reopen and transfer sessions using this page.

Expected Click to reopen 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 <u>Reopening and Editing Expected Counts and Amounts for Sessions</u>.

Self Service Session	Indicates the gifts in the session that were created as a result of online giving.

Related Links
<u>Initializing and Balancing the Session</u>

Transferring Sessions

Access the Transfer page (Click the Transfer Session link on the Session Summary 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.

Reopening 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 reopen 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 reopen expected counts and amounts for a session. Thus, you must first assign an individual the GPS staff role, and then that person can reopen the expected counts and amounts.

Note: To reopen 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 reopen expected counts and amounts:

1. Add an ID for the person to 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.

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3. Select filter criteria on the Session Filter page and search for the session to be reopened.

    Your search criteria might return multiple sessions, which is fine.

    To select filter criteria, select Contributor Relations > Session Management > Session Filter.

4. Reopen 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 reopen and click the Expected button in that row. A message appears that indicates that the session has now been reopened.

    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 reopened. The Expt Cnt (expected count) and Expt Amt (expected amount) fields are now available for input. You can 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 reopen the session for editing.

Managing the Acknowledgement Process

Important! Letter Generation (Letter Gen) is a deprecated product. Support will be maintained for this product, but no new development will be produced for Letter Gen. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see "Using the Communication Generation Process" (PeopleSoft Campus Solutions 9.2: Campus Community)

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:

Image: Acknowledgement process into letter generation

This graphic illustrates the flow of information from the Acknowledgement process into letter generation:
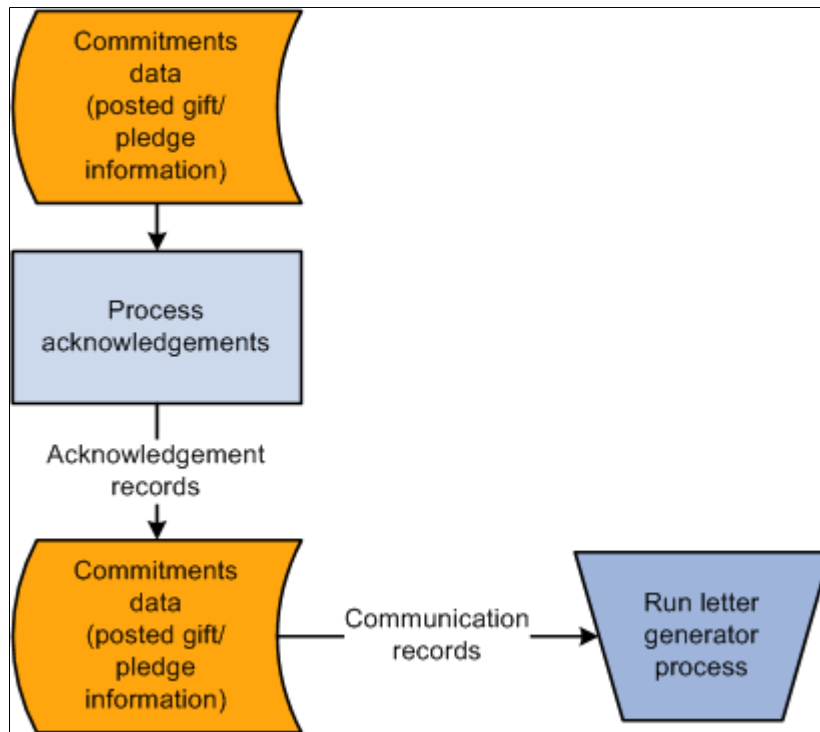
The 3Cs Engine generates joint communications for acknowledgement letters and receipts. After the communications record exists, you can run the Letter Generator process (CCLTRGEN). The 3C Engine runs through a series of rules to determine which records are joined and should receive joint communications. 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 about 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

	Donor	**Spouse**
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.

Related Links
"Understanding Joint Communications" (PeopleSoft Campus Solutions 9.2: Campus Community)
Setting Up Institution Defaults

Processing Acknowledgement Letters

This section discusses how to automatically process acknowledgment letters.

Page Used to Process Acknowledgement Letters

Page Name	**Definition Name**	**Navigation**	**Usage**
Process Acknowledgements	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 (Contributor Relations > Session Management > Acknowledgements > Process Acknowledgements).

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

Important! Letter Generation (Letter Gen) is a deprecated product. Support will be maintained for this product, but no new development will be produced for Letter Gen. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see "Using the Communication Generation Process" (PeopleSoft Campus Solutions 9.2: Campus Community)

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 have been processed.

See "Using the Letter Generation Process" (PeopleSoft Campus Solutions 9.2: Campus Community).

Working with Manually Generated Acknowledgements

Important! Letter Generation (Letter Gen) is a deprecated product. Support will be maintained for this product, but no new development will be produced for Letter Gen. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see "Using the Communication Generation Process" (PeopleSoft Campus Solutions 9.2: Campus Community)

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	Definition 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 (Contributor Relations > Session Management > Acknowledgements > Acknowledge Suspense).

Image: Acknowledgement Suspense page

This example illustrates the fields and controls on the Acknowledgement Suspense page. You can find definitions for the fields and controls later on this 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.

Related Links

Working with Worksets

Viewing Acknowledgement Details

Access the Acknowledgement Detail page (Click the Process Button on the Acknowledgement Suspense or Acknowledgement List page).

When you process a letter you have the options of selecting and generating a standard letter, assigning a customized letter, or not sending 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 appears 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 (Click the Transfer button on the Acknowledgement Suspense or Acknowledgement List 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 are immediately assigned to the individual you select.

Viewing Acknowledgement Lists

Access the Acknowledgement List page (Contributor Relations > Session Management > Acknowledgements > Acknowledgement List).

Image: Acknowledgement List page

This example illustrates the fields and controls on the Acknowledgement List page. You can find definitions for the fields and controls later on this 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.

Related Links

Building a Workset From a Page in the System

Managing Joint Communications

Important! Letter Generation (Letter Gen) is a deprecated product. Support will be maintained for this product, but no new development will be produced for Letter Gen. It is strongly recommended that you use Communication Generation (Comm Gen) instead. For more information on Comm Gen, see "Using the Communication Generation Process" (PeopleSoft Campus Solutions 9.2: Campus Community)

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

Related Links
"Understanding Joint Communications" (PeopleSoft Campus Solutions 9.2: Campus Community)

Handling Matching Gifts

This section provides and overview of matching gifts and matching gift processing, and also discusses how to:

- View an organization's matching gift rules.

- View an organization's matching gift restrictions.

- View outstanding matching gifts.

- View expected matching gifts.

- View matching gifts for people.

- View matching gifts for organizations.

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 appear 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

Ratio	Currency	From Amount	To Amount
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	Definition Name	Navigation	Usage
Matching Gift Rules (inquiry)	AV_MTCH_RULES_INQ	• Contributor Relations, Session Management, Matching Gifts, Matching Rules Details • Contributor Relations, Constituent Information, 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; eligible and ineligible designation type, gift types, alumni statuses, and employee statuses; and contact information about an organization's matching gift program.
Outstanding Matching Gifts	AV_MTCH_P_LIST AV_MTCH_P_LIST_W	• Contributor Relations > Session Management > Matching Gifts > Person Matching Gift • Contributor Relations > Session Management > Matching Gifts > Matching Gifts - Workset	View information about the expected matching gifts resulting from a donor's gifts.
Ext Org Matching Gifts (external organization matching gifts) inquiry page	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 Gifts (external organization matching gifts)	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 Matching Gift Rules inquiry page (Contributor Relations > Session Management > Matching Gifts > Matching Rules Details).

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 and **To Ratio**	Displays the formula by which an organization calculates its matching amount for each regular donor gift to your institution.
Minimum Match Amount and **Maximum Match Amount**	Displays amounts used in the automatic calculation of the expected matching gift amount.

Restrictions

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.

Attachments

Use the fields in this group box to view existing attachments to the organization's matching gift rules record. Click the View link to open the attachment in a new window.

Viewing Outstanding Matching Gifts

Access the Outstanding Matching Gifts page (Contributor Relations > Session Management > Matching Gifts > Person Matching Gift).

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.
Gift Number	Click a gift number link to view detailed information about a particular gift on the Gift Detail 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 Gifts page (Contributor Relations > Session Management > Matching Gifts > Ext Org Matching Gift).

This page displays both matching gifts entered individually as well as those picked up by the COBOL cleanup process run on the Maintain Sessions 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 appear on this page.
Gift Number	Click a gift number link to view detailed information about a particular gift on the Gift Detail 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 (Contributor Relations > Analyze Giving History > Person Giving Summaries > Person Matching Gifts).

This page displays both matching gifts entered individually as well as those picked up by the COBOL cleanup process run on the Maintain Sessions page.

Business Unit	Displays the business unit associated with the expected matching gift.
Gift Number	Click a gift number link to view detailed information about a particular gift on the Gift Detail page.
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.

Related Links

Viewing Expected Matching Gifts

Viewing Matching Gifts for Organizations

Access the Ext Org Matching Gifts inquiry page (Contributor Relations > Analyze Giving History > Organization Giving Summaries > Ext Org Matching Gifts). The fields on this page are the same as those on the Person Matching Gifts page.

See Viewing Matching Gifts for People.

Managing Giving Clubs

This section provides an overview of giving clubs and 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.

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	Definition 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.
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.

Page Name	Definition Name	Navigation	Usage
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 (Contributor Relations > Session Management > Giving Clubs > Giving Club Membership).

Image: Giving Club Membership page

This example illustrates the fields and controls on the Giving Club Membership page. You can find definitions for the fields and controls later on this 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 (Contributor Relations > Session Management > Giving Clubs > 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 the current 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 Defining Giving Clubs.
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 select 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.

Related Links

Contributor Relations Reports: A to Z

Tracking Giving Club Progress

Access the Giving Club Progress page (Contributor Relations > Analyze Giving History > Person Giving Summaries > Giving Club Progress).

Image: Giving Club Progress page

This example illustrates the fields and controls on the Giving Club Progress page. You can find definitions for the fields and controls later on this 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 (Contributor Relations > Session Management > Giving Clubs > Giving Club Summary).

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.

Related Links

Defining Giving Clubs

Viewing a Giving Club Membership Summary

Access the Giving Club Membership Summary page (Contributor Relations > Session Management >
Giving Clubs > Giving Club Member Summary).

> **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.

Related Links

Building a Workset From a Page in the System
Manually Generating Giving Club Memberships

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	Definition 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 (Contributor Relations > CR Reports > Giving Reports > CAE Report).

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 reporting tool populates the report cells and calculates 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.

Related Links
AVPCAE, GFTINC, GFTINCII, GFTINCIV − CAE Gift Income Report

Chapter 19

Analyzing Giving History

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 lists common elements and 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.

- Filter donor commitment registers.

- View donor commitment registers.

- Filter 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	Definition 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	Definition 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	Select 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	Definition 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 (Contributor Relations > Analyze Giving History > Person Giving Summaries > Giving Profile).

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.

Image: Giving Profile page

This example illustrates the fields and controls on the Giving Profile page. You can find definitions for the fields and controls later on this 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, by business unit, 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 appear 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.

Related Links

Tracking Giving Club Progress

Viewing an Organization's Giving Profile

Access the Giving Profile page (Contributor Relations > Analyze Giving History > Organization Giving Summaries > Giving Profile - Org).

Image: Giving Profile page for organizations

This example illustrates the fields and controls on the Giving Profile page for organizations. You can find definitions for the fields and controls later on this page.

Important! You must run the Accumulate Constituent Totals process when processing sessions or after updating matching gift information to ensure that the totals on this page are accurate.

Lifetime Information

Lifetime Commitments	Displays the total amount of money ever donated or pledged by the organization.
	Click to view the date, gift type, credit type, and amount for each commitment made on the Lifetime Commitments page.
Lifetime Open Pledges	Displays the total amount of money promised but not yet donated by the organization.
	Click to view the date, gift type, credit type, and amount for each outstanding pledge on the Lifetime Open Pledges page.
Largest Pledge	Displays the amount of the largest pledge commitment the organization has made.
	Click to view detailed information about the pledge on the Largest Pledge page, and to access the Designation Detail and Recognition Detail pages.
Lifetime Gifts/Payment	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 appear 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.

Related Links
Tracking Giving Club Progress

Viewing a Donor's Commitment Summary

Access the Commitment Summary page (Contributor Relations > Analyze Giving History > Person Giving Summaries > Commitment Summary).

Image: Commitment Summary page

This example illustrates the fields and controls on the Commitment Summary page. You can find definitions for the fields and controls later on this page.

Commitment Summary

Will Beatty   ID: AV0500
Constituent Type: Friend   Year: None PSUNV   Prospect Manager: NONE

	Lifetime Commitments	Lifetime Giving	Total Years Giving	Consecutive Years Giving
	10,950.00 USD	6,050.00	2	0

Customize | Find | View All | First ◄ 1-3 of 3 ► Last

Fiscal Year	Total Commitments	Total Giving	Pledge Balance	Recognition Credits	Recognition Pledge Balance	Details
2005	3,000.00	0.00	2,000.00	0.00	1,000.00	Details
2004	6,950.00	5,050.00	500.00	1,400.00	0.00	Details
2003	1,000.00	1,000.00	0.00	0.00	0.00	Details

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 (Click the Details link on the Commitment Summary page), where giving information is totaled by designation.

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 (Contributor Relations > Analyze Giving History > Person Giving Summaries > Commitment Register > Commitment Register Filter) 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.

Image: Commitment Register Filter page

This example illustrates the fields and controls on the Commitment Register Filter page. You can find definitions for the fields and controls later on this 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 (Contributor Relations > Analyze Giving History > Person Giving Summaries > Commitment Register > Commitment Register).

Image: Commitment Register page

This example illustrates the fields and controls on the Commitment Register page. You can find definitions for the fields and controls later on this page.

	Anonymous	Business Unit	Date	Transaction Type	Credit Type	Amount		Tribute	Details
1	☐	PSUNV	09/28/2004	Gift	Hard Credit	50.00	USD	☐	Details
2	☐	PSUNV	09/28/2004	Gift	Soft Credit	400.00	USD	☐	Details
3	☐	PSUNV	09/28/2004	Gift	Hard Credit	5,000.00	USD	☑	Details
4	☐	PSUNV	09/28/2004	Gift	Soft Credit	1,000.00	USD	☐	Details
5	☐	PSUNV	09/13/2003	Gift	Hard Credit	1,000.00	USD	☐	Details

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 (Contributor Relations > Analyze Giving History > Person Giving Summaries > Transaction Register > Transaction Filter) 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.

Image: Transaction Filter page

This example illustrates the fields and controls on the Transaction Filter page. You can find definitions for the fields and controls later on this page.

You can limit the number of transactions you can 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 appears to the right of this field. If a donor made a commitment to a designation that is now inactive, the designation still appears 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 (Contributor Relations > Analyze Giving History > Person Giving Summaries > Transaction Register > Transaction Register).

Image: Transaction Register page

This example illustrates the fields and controls on the Transaction Register page. You can find definitions for the fields and controls later on this 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 (Contributor Relations > Analyze Giving History > Workset Giving Summaries > Giving Profile Compare).

Image: Profile Compare page

This example illustrates the fields and controls on the Profile Compare page. You can find definitions for the fields and controls later on this 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 appears. Select the check box next to each field to display it 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.

Related Links

"Defining Contributor Relations User Defaults" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

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	Definition 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 (Contributor Relations > CR Reports > Giving Reports > 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 appear 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.

From Gift Amount and **To Gift Amount**

Note: These fields relate to an individual gift range. Higher gift totals may appear on the generated report because the report calculates an individual's cumulative giving.

Constituents

Select the type of constituents whose commitments you want to view on the report. The values that appear 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 Defining Constituent Types.

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. The From Gift Amount and To Gift Amount fields affect the report processing as follows:

• When the From Gift Amount is greater than zero AND the To Gift Amount is equal to zero, the selection criteria treats the From Gift Amount as the lower threshold with no limit on the To Gift Amount.

For example, if the From Gift Amount is equal to 1,000.00 USD and the To Gift Amount is equal to 0.00 USD, then the selection criteria is all gift amounts greater than or equal to 1,000.00 USD.

*   When the To Gift Amount is greater than zero AND the From Gift Amount is equal to zero, the selection criteria treats the To Gift Amount as the upper threshold with no limit on the From Gift Amount.

    For example, if the To Gift Amount is equal to 21,000.00 USD and the From Gift Amount is equal to 0.00 USD, then the selection criteria is all gift amounts less than or equal to 21,000.00 USD.

*   When the From Gift Amount is greater than zero AND the To Gift Amount is greater than zero, the selection criteria treats the From Gift Amount as the lower threshold and the To Gift Amount as the upper threshold.

    For example, if the From Gift Amount is equal to 1,000.00 USD and the To Gift Amount is equal to 21,000.00 USD, then the selection criteria is all gift amounts greater than or equal to 1,000.00 USD and less than or equal to 21,000.00 USD.

*   When the From Gift Amount is equal to zero AND the To Gift Amount is equal to zero, the SQR process does not consider either the From Gift Amount or the To Gift Amount as part of the selection criteria.

    For example, if the From Gift Amount is equal to 0.00 USD and the To Gift Amount is equal to 0.00 USD, then no additional selection criteria is generated and all donors to the selected designation are included in the report.

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.

Related Links
Contributor Relations Reports: Selected Reports

Chapter 20

Interfacing with PeopleSoft Financials

Understanding the Interface

If your institution uses a financial system other than Peoplesoft Financials to run GL interface, the system creates a flat file, which your institution's financial system can access. However, if your institution uses PeopleSoft Financials, Contributor Relations can use publish and subscribe functionality (messaging back and forth) between its database and PeopleSoft Financials so that the two systems can share accounting line information. The publish and subscribe functionality is asynchronous, meaning that the systems do not process GL transactions in real time.

Publish and subscribe functionality helps your institution's ability to track financial information in both Contributor Relations and PeopleSoft Financials, since the messages sent from PeopleSoft 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.

For more information, see *PeopleSoft FSCM: General Ledger*

Related Links
Processing and Posting Sessions

Understanding Messaging

The diagram below illustrates how messages travel between Contributor Relations and Financials 8.4 or 8.8.

Image: Messaging process for Contributor Relations to Financials 8.4 or 8.8, including publishing and subscription

This graphic illustrates how messages, including publish and subscribe, pass from Contributor Relations through to Financials version 8.4 or 8.8:
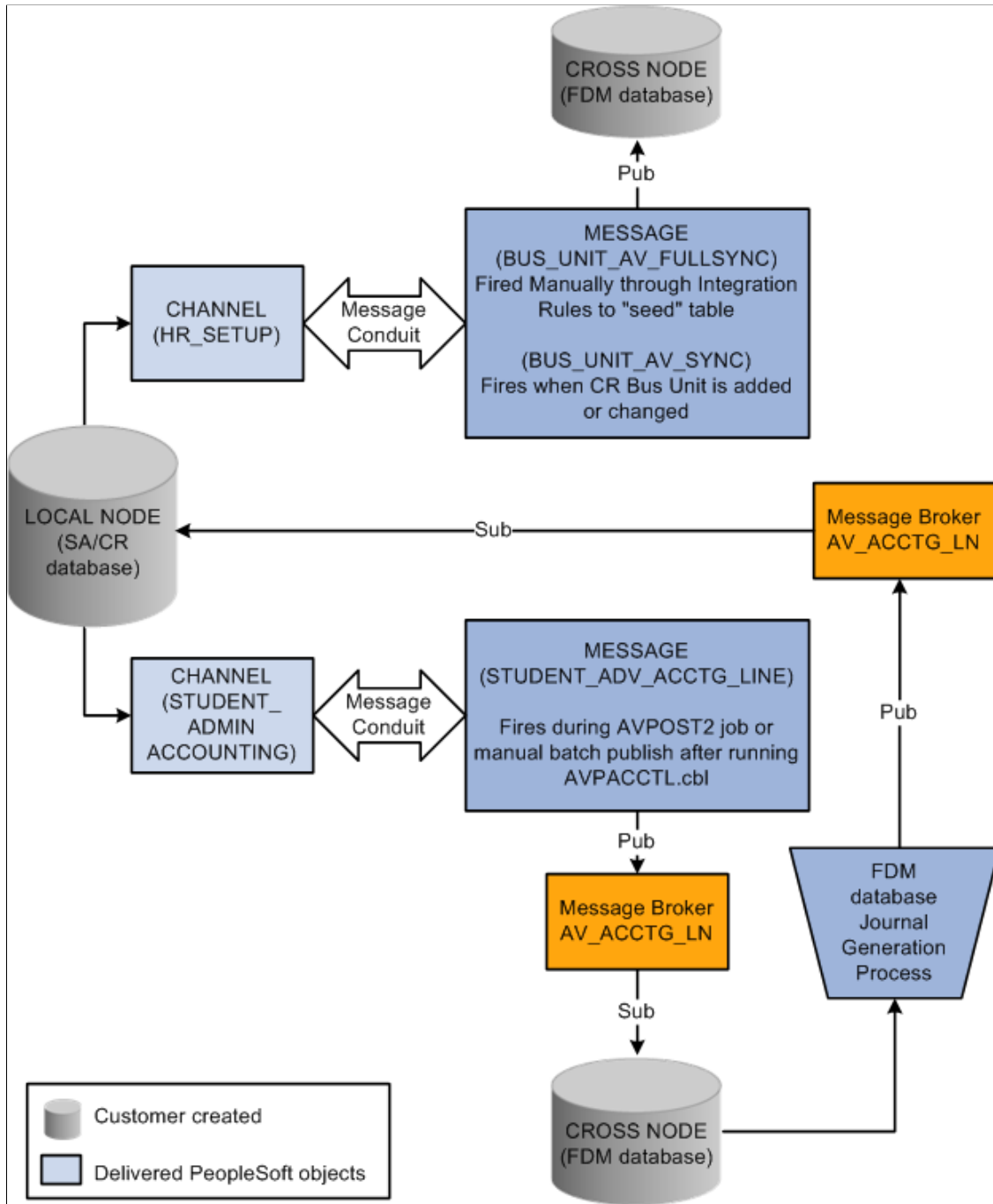
Contributor Relations delivers two queues and three messages to the Financials database:

Queues	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 queue. 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 queue 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:

- Identify financial software version.

- 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	Definition 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.

Page Name	Definition Name	Navigation	Usage
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 accesses (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 Financial Software Version

Your Financials Release selection on the CR Installation page 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 Financials and by an external financial application. The values *8.4* or *8.8* triggers an integrated messaging interface.

Related Links
Completing a PeopleSoft Contributor Relations Installation

Defining Batch Publish Rules

Access the Batch Publish Rules page (Enterprise Components > Integration Definitions > Batch Publish Rules) 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.

Image: Batch Publish Rules page

This example illustrates the fields and controls on the Batch Publish Rules page. You can find definitions for the fields and controls later on this 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 (Enterprise Components > Integration Definitions > Batch Publish Rules > Batch Programs).

Image: Batch Programs page

This example illustrates the fields and controls on the Batch Programs page. You can find definitions for the fields and controls later on this page.

Enter the Process Name *AVPACCTL,* which EOP_PUBLISHA or EOP_PUBLISHM picks up when publishing accounting lines to the Financials system. If you do not select this process, the messages are not created when EOP_PUBLISHA or EOP_PUBLISHM runs.

Setting Up Business Unit Synchronization

Access the Full Table Publish Rules page (Enterprise Components > Integration Definitions > Full Data Publish Rules) 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.

Image: Full Table Publish Rules page

This example illustrates the fields and controls on the Full Table Publish Rules page. You can find definitions for the fields and controls later on this 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 (Enterprise Components > Integration Definitions > Initiate Processes > Full Data Publish).

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 the Run button.

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 queue 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.

PeopleSoft General Ledger documentation contains additional helpful information.

Publishing Accounting Line Information Automatically

This section discusses how to run the AVPOST2 job.

Page Used to Publish Accounting Line Information Automatically

Page Name	Definition 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 Running the GL Interface Job (AVPOST and AVPOST2).

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).

Related Links
Running the GL Interface Job (AVPOST and AVPOST2)

Publishing Accounting Line Information Manually

This section discusses how to process accounting lines manually. You can 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	Definition 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.

Related Links

Publishing Accounting Line Information Manually

Running the Batch Publish Application Engine Process (EOP_PUBLISHM)

After you have manually generated accounting lines, access the Batch Publish page (Enterprise Components > Integration Definitions > Initiate Processes > Batch Publish) to publish them to the Financials database.

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.

Related Links
Publishing Accounting Line Information Automatically

Monitoring Message Results and Status

Use PeopleTools Service Operation Monitoring pages to view published data and check the status of messages. This applies to all published and subscribed messages.

See *PeopleTools: Application Engine*

Reviewing 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

Related Links

Viewing Accounting Lines

Understanding Interface Setup Best Practices

This section discusses how to:

- Avoid integration setup errors.

- Avoid queue 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.

Related Links

Defining Batch Publish Rules
Setting Up Business Unit Synchronization
Identifying Financial Software Version

Avoiding Queue Errors

Verify your channel settings in Application Designer. This helps 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 Service Operation 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 Queue, go to Queue Properties, and make sure the Queue 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 Queue, 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 helps 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 Service Operation 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 Service Operations 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 Service Operation 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 Queue 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 Service Operation 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 PeopleTools > Integration Broker > Service Operations Monitor > Administration > Node Status.

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 *PeopleTools: Integration Broker*.

If changes are made to Queues 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

Understanding Involvement

PeopleSoft Campus Solutions offers 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 Campus Self Service.

See "Understanding PeopleSoft Outreach for Fundraising" (PeopleSoft Campus Solutions 9.2: Self Service)

Virtually all fund-raising 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

The life cycle of self-service online giving has three stages: set up, enter, and process. The steps within these stages may vary, depending on a contributor's choices, but this diagram shows a high-level overview of the stages:

Image: Overview of the life cycle of online giving

This graphic illustrates the steps of the online giving life cycle process, from setup, to entering and processing the gift:
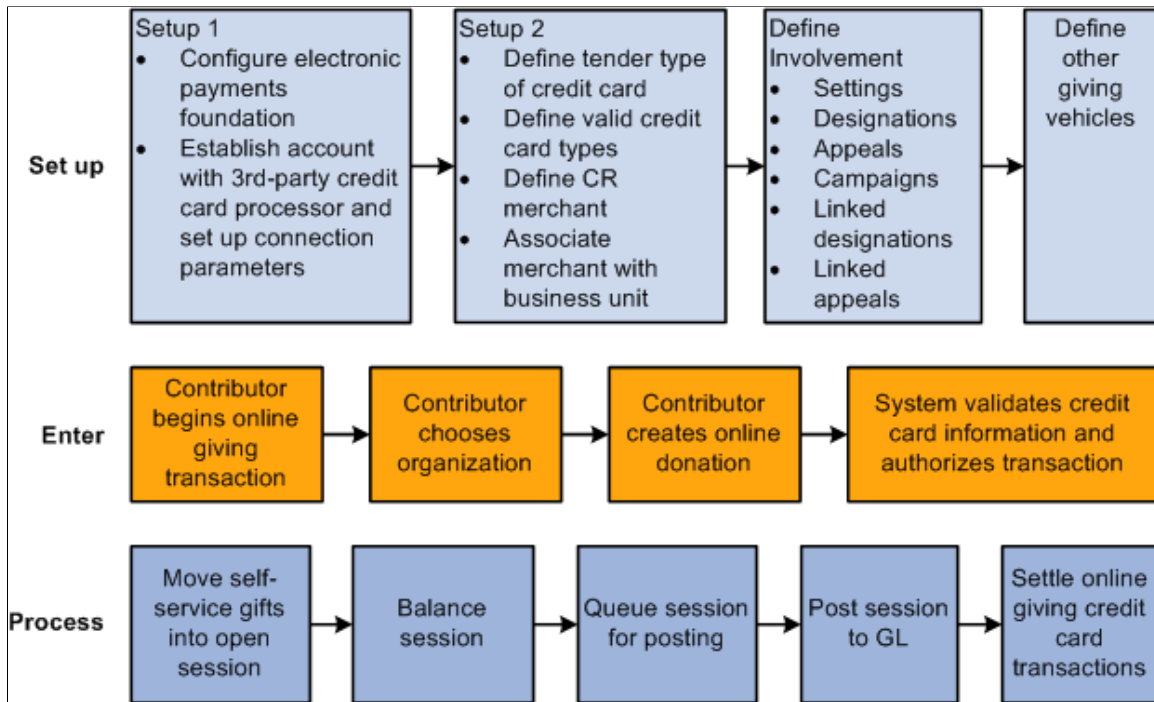
You can find additional information in the "Electronic Payment Integration Developer's Reference Guide" in My Oracle Support (ID 1982664.1).

Related Links
Understanding Credit Card Processing

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. The online pledge life cycle has two stages, as shown in this diagram:

Image: Overview of the life cycle of online pledging, including details for enter and process steps

This graphic illustrates the steps of the online pledge life cycle process, from entering to processing the gift:
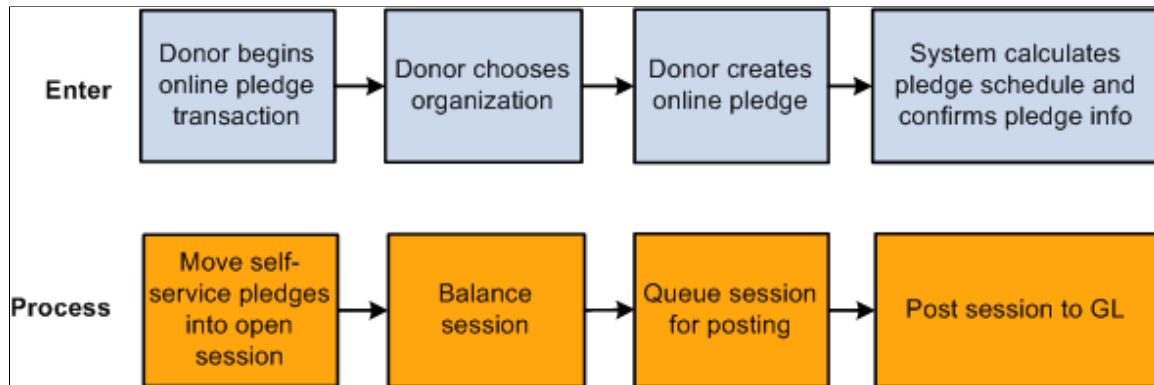
Giving Online to the Institution

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 contributors decide to give, the system presents them with a series of pages to enter donation specifics and credit card information. If contributors decide not to give over the internet, they also have the option of printing a mail-in donation form.

This section provides overviews of secure online giving and Involvement navigations, lists prerequisites, and discusses how to:

- Select an organization.

- Select a way to give.

- Start the online giving process.

- Enter gift information.

- Enter payment information.

- Confirm and submit payment information.

- View fund information.

- View payment results.

- Select an existing campaign.

- Donate to an existing campaign.

- Give by mail.

Understanding Secure Online Giving

To donate online, contributors complete these steps as they navigate through the process:

1. Designate a gift amount and gift distribution.

2. Enter credit card, billing address, and other contact information.

3. Review the information already entered and complete the transaction.

Understanding Self-Service Involvement Navigations

These navigation guidelines apply to all of the Involvement online giving pages:

•   Click the Next button to proceed to the next page in the process.

•   Click the Previous button to return to the previous page.

•   Click the Return to Involvement button to go to the Involvement home page.

•   Click the Mail In Donation Form button to access the Mail In Donation page.

Related Links

Selecting a Way to Give
Monitoring Self-Service Commitment Summary
Monitoring Self-Service Giving Club Progress
Monitoring Self-Service Membership History

Prerequisites

You must define specific information on these pages before self-service contributors can use the pages for online giving:

•   On the Donations - Choose Organization page, define multiple institutions so that donors can select an organization to receive their gift.

•   On the Ways to Give page, you must define these options:

    •   Web campaigns on the Web Campaigns page.

    •   Giving vehicles on the Defining Giving Vehicles page.

    •   Settings and contact information on the Involvement Setup page.

    •   Define credit card merchant information on the CR Merchants page.

•   On the Web Campaigns page, define campaigns from which donors can select.

Related Links

Setting Up Self-Service Online Giving and Pledges

Pages Used to Give Online to the Institution

Page Name	Definition 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 Donations - 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 this 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, and 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 their 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 manually, and mail it to the institution.

Selecting an Organization

Access the Donations - Choose Organization page.

Select an organization name to access the Ways to Give page. For this page to appear, you must have previously defined more than one active institution on the Involvement Setup page.

Selecting a Way to Give

Access the Ways to Give page.

Select one of three predefined options:

•   *Make your gift securely online.* Click this link to directly access the online donation process. On the pages that appear, contributors can apply their donation to specific campaigns, fund designations, and appeals.

•   *Invest in existing campaigns.* Click this link to see a list of campaigns predefined by the organization. On these subsequent pages, contributors select a campaign to which the organization has already associated specific designations and appeals. These campaign-specific designations and appeals appear as available values for the selected campaign.

•   *Mail-in donation form.* Click this link to access a printable form that contributors can complete and mail. This option also lists the address to which to send the donation form. You define the mailing address on the Involvement Setup page.

Organizations can define other ways to give using the Giving Vehicles setup page. If giving vehicles were set up previously, then they 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.

Related Links
Defining Giving Vehicles

Starting the Online Giving Process

Access the Make a Donation - Welcome page.

This page welcomes the visitor and explains how to navigate through the online giving process. This page also provides information about the mail-in donation form and contact information for the organization.

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 fund-raising campaign, they select it here. The organization also collects information about how the contributor heard about the fund-raising 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, then the system applies the gift based on the contributor's selection on the Ways to Give page. If the contributor enters through the Give securely online link, then 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 that appear in this section are defined on the Web Designations page. When a contributor sends a gift to specific funds, rather than contributing to the organization's greatest need, the designation value and amount fields are 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 they can click the Evenly Distribute Gift button.

Entering Payment Information

Access the Make a Donation - Payment Information page.

Enter 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 from the Campus Community Installation Setup page), but a contributor can modify any field.

Note: If you have selected the Security Code - Self Service check box for a Payment Merchant on the CR Merchants page, the system requires users to enter their credit card's security code as well as their credit card type, number, and expiration date. The explanatory "What is a security code?" link also appears.

When a contributor navigates to the next page, the system performs an internal system check to ensure that all required information is entered properly. The system prompts for corrections if it finds any errors or missing information.

Confirming and Submitting Payment Information

Access the Make a Donation - Confirm and Submit page.

This page displays online gift details for the contributor's review. Contributors can access the View Fund Information page to review details about the funds they designated on the Make a Donation - Gift Information page.

Viewing Fund Information

Access the Fund Information page.

When you determine that the information on the Fund Information page is correct, click Submit to submit the online gift transaction. The system sends the credit card information to a third-party credit card

payment processor to authorize the gift amount. If the transaction fails, for example, because of invalid card or billing information, then the Payment Result page displays an error message.

Related Links
Processing Credit Card Transactions

Viewing Payment Results

After a transaction is successfully authorized, the Payment Result page appears.

This page displays a message 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 hard copy receipt that is mailed later, using the current Contributor Relations Acknowledgement process.

If the payment is not successful, the Payment Result page displays an error message.

Related Links
Generating Acknowledgement Letters

Selecting an Existing Campaign

Access the Involvement Setup page.

This page enables organizations to define campaigns and to link related designations and appeals to a specific campaign. When you click the Invest online in existing campaigns link, you see only the designations and appeals related to the selected campaign as you proceed through the online giving pages.

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 applies 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

Access the Mail In Donation Form page.

Online visitors who do not want to transmit personal information using the internet can use this page to contribute. Print this page using your web browser's Print functionality, complete the form, 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

This section provides an overview of the online pledge process and discusses how to:

* Select a way to give.

* Invest in an existing campaign.

* Make a pledge online.

* Enter pledge information.

* Enter payment information.

* Confirm and submit a pledge.

Understanding Online Pledges

To make a pledge online, donors complete these steps:

1. 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	*Definition 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.

Page Name	Definition Name	Navigation	Usage
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 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.

Selecting a Way to Give

Two links on the Donations - Ways to Give page enable donors to begin the pledge process:

• Click the Invest in existing campaigns link to access the Donations - Campaigns page, where you can select a campaign to receive your pledge.

• Click the Make a pledge on-line link to access the Make a Donation - Welcome page; where you can select a campaign to receive your pledge later in the process.

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 select 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 contact information for the institution and a link to the mail-in donation form.

Entering Pledge Information

Access the Make a Donation - Pledge Information page. This page changes, depending on which link donors use on the Donations - Ways to Give page:

- If donors access this page through the Make a pledge on-line link, they can select a specific campaign to receive the pledge.

- If they enter this page through the Invest in existing campaigns link, they have already selected a campaign, therefore, no campaign choices appear.

Regardless of how donors access this page, they can select an appeal code and designation fund options for their pledge. Donors enter the amount of their pledge on this page.

Making a Pledge to an Existing Campaign

The page displays only designations and appeals related to the campaign selected on the Donations - Campaigns page. The Fund Information section displays the default fund designation and appeal options linked to the campaign.

Entering Payment Information

Access the Make a Donation - Payment Information page.

Donors use this page to create a pledge payment schedule and to enter or verify their contact information.

Available options for a donor's pledge payment schedule include the start and end dates of the pledge period, the frequency of the pledge payments, and the 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

Access the Make a Donation - Confirm and Submit page.

Donors use this page to review their pledge information and finalize the transaction.

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. Then, it calculates the expected payment dates and amounts to fulfill the pledge.

When the donor confirms and submits the pledge information, the system:

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 transactions at this time.

Monitoring Self-Service Commitment Summary

This section discusses how to view a commitment summary.

Pages Used to Monitor Self-Service Commitment Summary

Page Name	Definition 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 lists the pages used to monitor progression through giving clubs during a self-service session.

Page Used to Monitor Self-Service Giving Club Progress

Page Name	Definition 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 lists the pages used to view information about participation in member organizations at the institution during a self-service session.

If a 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 click the Membership Organization link in any row to view detailed information about a particular membership in the Membership Detail group box.

Page Used to Monitor Self-Service Membership History

Page Name	Definition 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 a member's participation in member organizations at the institution.

Generating Self-Service Gift and Pledge Sessions

This section lists prerequisites and discusses how to create self-service gift and pledge sessions.

Prerequisites

To create 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	*Definition 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:

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, you should set the specified time frame between running the AV_INV_SESS process to 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) using 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 pledging; the check box is selected for self-service sessions.

When you use the Queue Sessions page to queue a session for posting, you can filter the page to show only self-service sessions. To do so, select the Self Service Session check box.

Related Links
Creating and Working with Sessions
Queuing Sessions for Posting
Processing and Posting Sessions

Processing Self-Service Credit Card Transactions

This section provides an overview of self-service transaction types, lists prerequisites, and discusses how to:

- Select self-service gift transactions for processing.

- Capture self-service gift transactions.

Understanding Self-Service Transaction Types

After you post a credit card gift to the general ledger, you can then process it through a third-party payment processor such as CyberSource. Contributor Relations supports the following transaction processes:

- *Authorization* authenticates the credit card number and places a temporary hold on the specified amount against the cardholder's credit card.

    It 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 if 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 capture process.

- *Capture* confirms the temporary hold placed on credit card funds after a transaction is authorized and bills the credit card.

- *Credit* issues a refund to a customer's credit card account after an adjusted gift.

Related Links
Understanding Credit Card Processing

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 capture 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 capture 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	Definition 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 capture 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 (Contributor Relations > Session Management > Process Electronic Payments > EP Transaction Processing).

Image: EP Transaction Processing - Filter Options page

This example illustrates the fields and controls on the EP Transaction Processing - Filter Options page. You can find definitions for the fields and controls later on this 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: The PeopleSoft system uses *CC* to designate this electronic payment tender type. However, you can define it in another way on the Tender Types page.

Transaction Requested	Select *Capture* to capture the self-service gift transactions. Other delivered values for transaction processes currently supported by CyberSource are: *Authorize, Authorize and Capture,* and *Credit.*

Note: *Authorize and Capture* 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.

Capturing Self-Service Gift Transactions

Access the EP Transaction Processing - Transaction List page (Click the Search button on the EP Transaction Processing - Filter Options page).

Note: On the EP Transaction Processing - Filter Options page, set Transaction Requested to *Capture.*

These 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 captured have a Payment Status value 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 capture 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 capture process.
Set Filter Options	Click to return to the EP Transaction Processing - Filter Options page.

If any transactions are not captured 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 capture 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 capture 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 for processing.

- Capture denied self-service gift transactions.

Pages Used to Work with Denied Self-Service Transactions

Page Name	Definition 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.

Page Name	Definition Name	Navigation	Usage
EP Denied Transactions - Transaction List	AV_EP_G_PROC	Click the Search button on the EP Transaction Processing - Filter Options page.	Select and capture 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 (Contributor Relations > Session Management > Process Electronic Payments > EP Denied Transactions).

Image: EP Denied Transactions - Filter Options page

This example illustrates the fields and controls on the EP Denied Transactions - Filter Options page. You can find definitions for the fields and controls later on this page.

Use this page in the same way that you select gifts for capture. 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 capture.

Related Links
Selecting Gift and Membership Transactions for Processing

Capturing Denied Self-Service Gift Transactions

Access the EP Denied Transactions - Transaction List page (Click the Search button on the EP Transaction Processing - Filter Options page).

Note: To capture, on the EP Denied Transactions - Filter Options page, set Transaction Requested to *Capture*.

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. The transaction remains in the system, but—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.

Related Links
Capturing Gift and Membership Transactions

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 recapture 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 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.

Related Links
Adjusting Gifts and Matching Gifts
Selecting Gift and Membership Transactions for Processing
Capturing Gift and Membership Transactions

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 processed. You have can investigate transactions 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 or pledge information.

- View self-service gift or pledge 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	Definition 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 Self-Service Gifts

Access the Self Service Giving Inquiry - Filter Options page (Contributor Relations > Session Management > Supervise Sessions > Self Service Giving Summary).

Image: Self Service Giving Inquiry - Filter Options page

This example illustrates the fields and controls on the Self Service Giving Inquiry - Filter Options page. You can find definitions for the fields and controls later on this 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.

This table describes each payment status on this page in detail:

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).

Payment Status	*Description*
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 that appear 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 (Contributor Relations > Session Management > Process Electronic Payments > EP Transaction Log Inquiry) 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.

Image: EP Transaction Log Inquiry - Filter Options page

This example illustrates the fields and controls on the EP Transaction Log Inquiry - Filter Options page. You can find definitions for the fields and controls later on this 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 the Receipt Number for a gift.

Related Links
Understanding Credit Card Processing

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

Data Field Details

Use the values in the following table to create your custom API.

Line Nbr	Column Name	Type	MSSQL Length	Precision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
1	BUSINESS_ UNIT	Char KEY	5	Not Applicable (NA)	Not Applicable (NA)	This is the business unit for the session.	PSUNV	PSUNV
2	SEQ_NBR	decimal KEY	15	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	NA	NA	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	NA	NA	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*

Line Nbr	Column Name	Type	MSSQL Length	Precision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
5	EXT_ORG_ID	char	11	NA	NA	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	15	13	2	The monetary amount of the gift or pledge.	1000.00	12000.00
7	GIFT_TYPE	char	6	NA	NA	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	NA	NA	This field exists for future development and is not used in the current process.	NA	NA
9	FISCAL_YEAR	smallint	24	5	0	The financial year during which the gift or pledge is to be counted.	2003	2003
10	GIFT_DT	PSDATE	10	NA	NA	The date of record for the gift or pledge.	01-01-2003	01-01-2003
11	TENDER_TYPE	char	6	NA	NA	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*

Line Nbr	Column Name	Type	MSSQL Length	Precision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
12	CURRENCY _CD	char	3	NA	NA	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*
13	CHECK_NO	char	10	NA	NA	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 are inactive. DO NOT USE as they are replaced with new Active Fields for credit card referenced below.							
14	CREDIT_ CARD_NO *Inactive field*	char	20	NA	NA	Do not use. **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.	Do not use	Do not use
15	CREDIT _CARD_ HOLDER *Inactive field*	char	30	NA	NA	Do not use. **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.	Do not use	Do not use

Line Nbr	Column Name	Type	MSSQL Length	Precision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
16	CREDIT _CARD_ TYPE *Inactive field*	char	2	NA	NA	Do not use. **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.	Do not use	Do not use
17	CREDIT_ CARD_EXP _DT *Inactive field*	PSDATE	8	NA	NA	Do not use. **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.	Do not use	Do not use
18	TENDER _TYPE_ NOTE	char	50	NA	NA	Short comment related to the gift tender.	NA	*Leave blank*
19	CAE_GIFT_ TYPE	char	1	NA	NA	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*
20	PLDG_ EFFDT	PSDATE	10	NA	NA	The date that the pledge is considered active. Can be in the future.	*Leave blank*	01-15-2003
21	PLEDGE_ DT	PSDATE	10	NA	NA	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	10	NA	NA	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	15	13	2	This field exists for future development and is not used in the current process.	NA	NA

Line Nbr	Column Name	Type	MSSQL Length	Precision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
24	LAST_PMT _DT	PSDATE	10	NA	NA	This field exists for future development and is not used in the current process.	NA	NA
25	CP_ PLEDGE_ NO	char	11	NA	NA	This field exists for future development and is not used in the current process.	NA	NA
26	FEED_FLG	char	1	NA	NA	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	FEED GIFT _FLG	char	1	NA	NA	Only used when AV_ SESS_TYPE (Line 3) = 'G'. Indicates whether a gift should be sent to the GL Interface to be tracked in the general ledger.	NA	NA
28	AV_PLDG_ STATUS	char	1	NA	NA	This field exists for future development and is not used in the current process.	NA	NA
29	PLEDGE_ PG_TYPE	char	2	NA	NA	This field exists for future development and is not used in the current process.	NA	NA

Line Nbr	Column Name	Type	MSSQL Length	Precision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
30	RCG_ EMPLID1	char	11	NA	NA	The following 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	NA
31	RCG_ EMPLID2	char	11	NA	NA	AV0026	AV0023	NA
32	RCG_ EMPLID3	char	11	NA	NA	AV0025	NA	NA
33	RCG_ EMPLID4	char	11	NA	NA	AV0024	NA	NA

Line Nbr	Column Name	Type	MSSQL Length	Precision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
34	RCG_EXT_ORG_ID1	char	11	NA	NA	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.	NA	AV1019
35	RCG_EXT_ORG_ID2	char	11	NA	NA	NA	NA	NA
36	RCG_EXT_ORG_ID3	char	11	NA	NA	NA	NA	NA
37	RCG_EXT_ORG_ID4	char	11	NA	NA	NA	NA	NA
38	RECOGNITION_TYPE1	char	1	NA	NA	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 percent of the GIFT_AMT (Line 6).	H	H

Line Nbr	Column Name	Type	MSSQL Length	Precision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
39	RECOGNITION_TYPE2	char	1	NA	NA	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 percent of the GIFT_AMT (Line 6).	H	S
40	RECOGNITION_TYPE3	char	1	NA	NA	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 percent of the GIFT_AMT (Line 6).	S	NA
41	RECOGNITION_TYPE4	char	1	NA	NA	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 percent of the GIFT_AMT (Line 6).	S	NA

Line Nbr	Column Name	Type	MSSQL Length	Precision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
42	RCG_PCT_AMT1	decimal	15	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
43	RCG_PCT_AMT2	decimal	15	15	2	500.00	12000.00	NA
44	RCG_PCT_AMT3	decimal	15	15	2	1000.00	NA	NA
45	RCG_PCT_AMT4	decimal	15	15	2	1000.00	NA	NA
46	ANONYMOUS_FLG1	char	1	NA	NA	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.	NA	Y
47	ANONYMOUS_FLG2	char	1	NA	NA	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.	NA	NA
48	ANONYMOUS_FLG3	char	1	NA	NA	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.	NA	NA
49	ANONYMOUS_FLG4	char	1	NA	NA	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.	NA	NA

Line Nbr	Column Name	Type	MSSQL Length	Precision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
50	DESIG NATION1	char	11	NA	NA	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
51	DESIG NATION2	char	11	NA	NA	LIBRARY	NA	NA
52	DESIG NATION3	char	11	NA	NA	NA	NA	NA
53	DESIG NATION4	char	11	NA	NA	NA	NA	NA
54	AV_DES_ BU1	char	5	NA	NA	The business unit that owns DESIGNATION1.	MEDBU	MEDBU
55	AV_DES_ BU2	char	5	NA	NA	The business unit that owns DESIGNATION2.	PSUNV	NA
56	AV_DES_ BU3	char	5	NA	NA	The business unit that owns DESIGNATION3.	NA	NA
57	AV_DES_ BU4	char	5	NA	NA	The business unit that owns DESIGNATION4.	NA	NA
58	INTV_CD1	char	10	NA	NA	The campaign that generated the gift or pledge to DESIGNATION1 (Line 49).	CMPGN 2003	CMPGN2003
59	INTV_CD2	char	10	NA	NA	The campaign that generated the gift or pledge to DESIGNATION2 (Line 50).	CMPGN 2003	NA

Line Nbr	Column Name	Type	MSSQL Length	Precision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
60	INTV_CD3	char	10	NA	NA	The campaign that generated the gift or pledge to DESIGNATION3 (Line 51).	NA	NA
61	INTV_CD4	char	10	NA	NA	The campaign that generated the gift or pledge to DESIGNATION4 (Line 52).	NA	NA
62	DES_PCT_AMT1	decimal	15	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
63	DES_PCT_AMT2	decimal	15	15	2	500	NA	NA
64	DES_PCT_AMT3	decimal	15	15	2	NA	NA	NA
65	DES_PCT_AMT4	decimal	15	15	2	NA	NA	NA
66	MOTIVATION_CD1	char	9	NA	NA	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	Precision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
67	MOTIVATION_CD2	char	9	NA	NA	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	NA
68	MOTIVATION_CD3	char	9	NA	NA	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).	NA	NA
69	MOTIVATION_CD4	char	9	NA	NA	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).	NA	NA

Line Nbr	Column Name	Type	MSSQL Length	Precision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
70	CHARITABLE _AMT1	decimal	15	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
71	CHARITABLE _AMT2	decimal	15	15	2	500	NA	NA
72	CHARITABLE _AMT3	decimal	15	15	2	NA	NA	NA
73	CHARITABLE _AMT4	decimal	15	15	2	NA	NA	NA
74	DESCR254	char	254	NA	NA	*PROCESS GENERATED − Do not enter any values.* Suspense Reason created by AVPGPLOA.	*Leave blank*	NA
75	COMPLETE _FLAG	char	1	NA	NA	*PROCESS GENERATED − Do not enter any values.* Indicates if session has been processed by AVPGPLOA.	*Leave blank*	NA
76	GP_LOAD_ STATUS	char	1	NA	NA	*PROCESS GENERATED − Do not enter any values.* Indicates whether the gift or pledge was processed or suspended by AVPGPLOA.	*Leave blank*	NA
77	SESSION_ NO	char	11	NA	NA	*PROCESS GENERATED − Do not enter any values.* Session Number created by AVPGPLOA.	*Leave blank*	NA
78	GIFT_NO	char	11	NA	NA	*PROCESS GENERATED − Do not enter any values.* Gift Number created by AVPGPLOA.	*Leave blank*	NA

Line Nbr	Column Name	Type	MSSQL Length	Precision	Scale	Comments	Gift Session Sample Data	Pledge Session Sample Data
79	CR_CARD_ EXPMO	char	2	NA	NA	The month of the year in which the credit card will expire. Must be entered in the format required by the database platform.	09	*Leave blank*
80	CR_CARD_ EXPYR	char	4	NA	NA	The year in which the credit card is no longer valid. Must be entered in the format required by the database platform.	2007	*Leave blank*
81	CR_CARD_ TYPE	char	2	NA	NA	The type of credit card being used to charge the gift. Must be a valid value from the AV_CR_CARD _TYPE record. Sample values include: • AE = American Express • DC = Diners' Club • DI = Discover • MC = Master Card • VI = Visa	VI	*Leave blank*
82	AV_CR_ CARD_NBR	char	44	NA	NA	The credit card number to which the donor is charging the gift.	4111111 1111111 11	*Leave blank*

Appendix B

Delivered Workflows for Contributor Relations

Delivered Workflows for Contributor Relations

This section discusses Contributor Relations workflows. The workflows are listed alphabetically by workflow name.

Send Action

This section describes the workflow that allows the user to send an action to notify someone who needs to know or who is impacted by the assignment.

See "Managing Prospect Actions" (PeopleSoft Campus Solutions 9.2: Self Service).

Description

Information Type	Description
Event Description	When a development officer creates or alters a constituent action, the officer may want to notify others that the action has occurred or will occur. This workflow allows the officer to send the action information to individuals who have an interest in its execution or outcome. It includes the ability to alter the action report prior to sending, adding explanatory text or removing sensitive information that should not be widely distributed.
Action Description	The development officer creates or alters an action. From the action in Outreach, 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 action information update to the specified recipients. Fields utilized in the email text include: ID, Name, Constituent Type, City, State, Gender, Action Number, Brief Description, Description, Planned Date, Action Type, Contact, Type, Status, Result, Contact Report Author, Contact Report Date, and Contact Report if it exists. The user can edit the information that defaults on the Send Contact Report page.

Workflow Objects

Information Type	Description
Workflow Objects	Event AV_OUTR_SEND Page PeopleCode
Workflow Actions	Role This workflow starts manually when the user clicks the Send button.
Development Officer	Email Template AV_OUTR_CNCT_SEND1 delivers an email notification to the specified recipient's inbox with the Subject: Action Update for Constituent's Name- Action Description from the constituent action. Email text includes the name of the sender and the action information.
Business Process	AV_OUTR_SEND
Business Activity	AV_OUTR_SEND Outreach Send Data includes three steps: 1) Submit Data, 2) Trigger email Action/Contact Report, 3) Email Outreach Data
Business Event	Send Report

Send BioDemo Update

This section discusses the workflow that sends email notifications of biodemographic updates in PeopleSoft Outreach.

See "Sending Updated Biographical Information" (PeopleSoft Campus Solutions 9.2: Self Service).

Description

Information Type	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.

Information Type	Description
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

Information Type	Description
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 Entering Action Results.

Description

Information Type	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

Information Type	Description
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 Contact Report, 3) Email Outreach Data
Business Event	Send Report

Appendix C

Contributor Relations Reports

Contributor Relations Reports: A to Z

This table lists the Contributor Relations reports, sorted by report ID.

Report ID and Report Name	Description	Navigation	Run Control Page
AV702 Graduates to Alumni	Lists graduates selected for the process and their constituent types. (Reporting tool: BI Publisher)	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. (Reporting tool: BI Publisher)	Contributor Relations > CR Reports > Giving Reports > Pledge Schedule Aging	AV_RUNCTL_PLAGE
AV704 Electronic Payment Processing Audit	Lists electronic payment transaction requests, sorted by status. (Reporting tool: BI Publisher)	Contributor Relations > Session Management > Process Electronic Payments > EP Run Review	AV_EP_RUN_DETAIL
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 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

Report ID and Report Name	Description	Navigation	Run Control Page
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). (Reporting tool: BI Publisher)	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.

AV702 − Graduates To Alumni Report

Running the Graduates To Alumni process generates a BI Publisher 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.

Related Links

Running the Graduates to Alumni Process

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

AV704 – Electronic Payment Processing Audit

The Electronic Payment Processing Audit report provides a summary of electronic payment transaction requests, sorted by status. The report lists transaction counts and amounts for each status category as well as details of how an electronic transaction was handled during processing. The EP Run Review - Transaction List page also contains this information, viewable online in the Contributor Relations system.

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 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 include related campaigns.

You should print this file and save it with each report so that you can retain information about the parameters used to generate the report.

Related Links
Generating the Campaign Progress Report

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.

Related Links

Generating Designation Donor Reports

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.

Related Links
<u>Generating Giving Club Memberships</u>

AVPCAE, GFTINC, GFTINCII, GFTINCIV − CAE Gift Income Report

This report was designed to comply with the standards created by CASE and CAE. It lists the amounts of your outright gifts and deferred gifts by constituent type; it also lists the number of donors and the total donation amounts by constituent type.

Note: The report sorts gifts by the donor's constituent type at the time the gift was made.

The Individual constituent types listed below appear in Parts I, II, and III of the report.

Alumni	(Column A) Former students who have earned some credit toward one of the degrees or diplomas at your institution (Constituent Type = 1, 2, 3).
Parents	(Column B) People, other than those who can be classified as Alumni, who are parents or guardians of current or former members of your institution (Constituent Type = 4).
Other	(Column D) People who cannot be classified as Alumni, Students, or Parents (Constituent Type = 5, 6, 7, 8, 9).

The Organization constituent types listed below appear in Parts I and II of the report.

Foundations	(Column E) Personal and family foundations, as well as other foundations and trusts that are private, tax-exempt entities operated exclusively for charitable purposes (Constituent Type = 12, 13).
Corporations and Businesses	(Column F) Corporations, partnerships, and cooperatives organized for profit-making purposes. This category includes corporations owned by individuals and families, company-sponsored foundations, and industry trade associations (Constituent Type = 10, 11).
Religious Organizations	(Column G) Churches, synagogues, temples, and their service groups (Constituent Type = 16).
Fund-Raising Consortia	(Column H) Entities formed by a group of cooperating institutions or organizations for the purpose of fund-raising activities (Constituent Type = 14).
Other	(Column I) Organizations that cannot be classified as Foundations, Corporations and Businesses, Religious Organizations, or Fund-Raising Consortia (Constituent Type = 15, 19). This category excludes governmental agencies.

Part I: Outright Gifts for Current Operations displays both unrestricted and restricted gifts. This section only includes hard credit gifts. 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 fund-raising program. Whereas Parts I, II, and III report donation amounts and destinations, Part IV provides a distinct count of donors. This section only reports on hard credit gifts.

Important! Constituent records that include a date of death or that do not have an active address are excluded from the counts in this part of the CAE report.

There are five sections in Part IV:

1. Gifts from Individuals.

   Gifts from Individuals lists gifts for all purposes, by constituent type. For Part A of this section (I, A1a-c), alumni types are retrieved from the AV_RCG_DES table. For Part B (I, B1a-c), alumni types are retrieved from the AV_CLASS_YR table. The alumni counts in Part B represent a donor's constituent type during the first contact with your institution.

   Comparing Part A and Part B values enables you to calculate a percentage of support for your institution.

   For Part G, 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.

Related Links

Generating CAE Reports

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, and **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 that appears 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, and **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.

You should print this file and save it with each report so that you can retain information about the parameters used to generate the report.

Related Links

Generating the Role Assignments Report