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# PeopleSoft Campus Solutions 9.2: Contributor Relations

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PeopleSoft Campus Solutions 9.2: Contributor Relations  
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# Preface

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## 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.

| <b><i>Typographical Convention</i></b> | <b><i>Description</i></b>   |
|--|---|
| <b>Key+Key</b>                         | 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 <b>Alt+W</b> , hold down the <b>Alt</b> key while you press the <b>W</b> 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.<br><br>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

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## PeopleSoft CS Related Links

[Hosted Online Help Home](#)

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

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## Contact Us

Send your suggestions to [psoft-infodev\\_us@oracle.com](mailto:psoft-infodev_us@oracle.com).

Please include the applications update image or PeopleTools release that you're using.

---

## Follow Us

| <i>Field or Control</i>   | <i>Description</i>                       |
|---|--|
|  | <a href="#">YouTube</a>                  |
|  | <a href="#">Twitter@PeopleSoft_Info.</a> |
|  | <a href="#">PeopleSoft Blogs</a>         |
|  | <a href="#">LinkedIn</a>                 |

## 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:

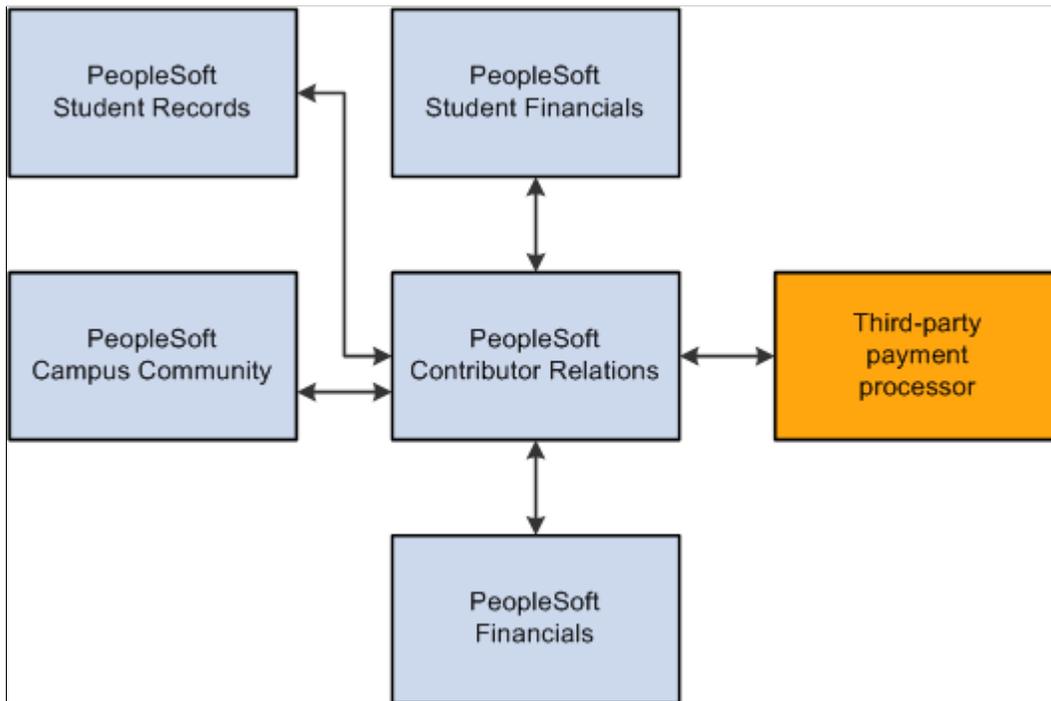
- Manage prospects and planned giving prospects.
- Manage campaigns and other initiatives.
- Enter and process commitments.

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:

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.

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## 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

| <b>Field or Control</b>                        | <b>Description</b>  |
|--|---|
| <b>Start Date and End Date</b>                 | 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. |
| <b>Person/Org</b>                              | Select either <i>Person</i> or <i>Organization</i> to determine the constituent you want to work with or view information about.  |
| <b>Currency Code</b>                           | 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.  |
| <b>Amount/Pct/Total</b> (amount/percent/total) | The format of this field changes depending on whether you are tracking percentages, amounts, or total numbers. Enter the appropriate amount.  |
| <b>Time Frame</b>                              | Select <i>Current</i> , <i>Historical</i> , or <i>All</i> to determine the time frame for which you want to view information. If you select <i>All</i> , current records appear as well as those for which the end date has passed.   |
| <b>Cnst Type</b> (constituent type)            | View the relationships a constituent has with your institution, such as <i>Alumni</i> , <i>Friend</i> , <i>Parent</i> , <i>Faculty</i> , <i>Staff</i> and so on. These values are shipped with 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" (*Campus Solutions Application Fundamentals*).



## Chapter 2

# Setting Up Your Contributor Relations Framework

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## 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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|------------------|------------------------|---|--|
| CR Installation  | AV_INSTALLATION        | <b>Set Up SACR &gt; Install &gt; Contributor Rel Installation</b> | Define system-wide business rules for many classic or fluid functional areas within the Contributor Relations system.<br>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**).

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.

### CR Installation

**Assignment Role Option**  
 Defined Responsibilities     Class     All

**Spouse Recognition Split**

|                 | Credit Type   | Percentage |
|-----------------|---------------|------------|
| Donor Record    | Hard Credit ▼ | 100.00     |
| Donor Record 2  | ▼             |            |
| Spouse Record   | Soft Credit ▼ | 100.00     |
| Spouse Record 2 | ▼             |            |

Default Soft Credit Type: Soft Credit ▼

Payment Schedule: Semi-Annually ▼

Feed Gift to GL  
 Feed Pledge to GL  
 Allow Pledge Payment Override  
 Require Contact Report

**Financials Release**  

Release 7.5 ▼
Release 7.5

**Name Display Type**  

Name Display Type ▼

**Enable New Features**  
 Enable CR Outreach Fluid

Strategy Number   
 Asset Number   
 Rating Number   
 Action Number   
 Initiative Action Number   
 Gift Number   
 Session Number   
 Relation Number   
 Planned Giving Number   
 Volunteer Group   
 Volunteer Structure Number   
 Membership Number   
 Member Payment Number   
 Last Receipt Number   
 Last Reference Number

## Assignment Role Option

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

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Defined</b>          | <p>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.</p> <p>For example, if staff member Darla Perkins is a Prospect Manager, you must first define <i>Prospect Manager</i> 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 <i>Prospect Manager</i> role appears as an available option when Darla Perkins is selected.</p> |

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Class</b>            | <p>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.</p> <p>For example, if you define the role of <i>Prospect Manager</i> and select the <b>Staff</b> 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.</p> |
| <b>All</b>              | <p>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.</p> <p>See <a href="#">Defining Roles</a>.</p>   |

## 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.

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Donor Record</b>     | 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. |
| <b>Donor Record 2</b>   | (Optional) Select a credit type and the percent of the gift to allocate to that credit type as the default.                             |
| <b>Spouse Record</b>    | Select a credit type and the percent of the gift to allocate to that credit type as the default for the spouse's recognition.           |
| <b>Spouse Record 2</b>  | (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.

| <b>Field or Control</b>                      | <b>Description</b>  |
|--|---|
| <b>Default Soft Credit Type</b>              | Select the soft credit type that will appear by default in the <b>Soft Credit</b> 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.<br><i>Hard Credit</i> is a delivered credit type. All other credit types are considered soft credit.   |
| <b>Payment Schedule</b>                      | Select the payment schedule that will appear by default in the <b>Payment Schedule</b> 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.   |
| <b>Feed Gift to GL and Feed Pledge to GL</b> | Select these check boxes for the ability to send gifts and pledges to the financial system for recording as a receivable. This process is not automatic. Selecting this check box activates the <b>Feed Pledge</b> 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 <b>Feed Pledge</b> check box selected in the AV_ACCTG_LN record that is created through the GL Interface process. |
| <b>Allow Pledge Payment Override</b>         | Select this check box to allow data entry staff to change recognition or designation information for a pledge at the time of pledge payment.  |

---

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

---

## Contact Reports

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

| <i>Field or Control</i>       | <i>Description</i>  |
|-------------------------------|---|
| <b>Require Contact Report</b> | 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 <i>Completed</i> . |

## 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

| <i>Field or Control</i>         | <i>Description</i>  |
|---------------------------------|---|
| <b>Enable CR Outreach Fluid</b> | Select to indicate that fluid features for Contributor Relations self service has been adopted. By default, this check box is deselected.<br><br>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

| <i>Page Name</i>           | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|----------------------------|------------------------|---|---|
| Institution Installation   | AV_INSTALL_INST        | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Install Contributor Relations &gt; Institution Defaults &gt; Institution Installation</b>   | Set institution default values that are used throughout the system. |
| Institution Installation 2 | AV_INSTALL_INST2       | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Install Contributor Relations &gt; Institution Defaults &gt; Institution Installation 2</b> | 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**).

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.

The screenshot shows the 'Institution Installation' page for 'PSUNV PeopleSoft University'. It features several configuration sections:

- Distribute Overpayment:** Radio buttons for 'Next Payment' (selected), 'Equally', and 'Ignore'.
- Distribute Underpayment:** Radio buttons for 'Next Payment' (selected) and 'Equally'.
- Financials Link:** Search fields for 'SetID' (MODEL), 'Calendar ID' (01), and 'Item Type' (000001000055).
- Membership:** A checked checkbox for 'Allow Gifts in Membership' and a 'Membership Days' field set to 60.
- Alumni Member Organization:** A search field for 'Member Organization Code' (ALUMASSN) with the label 'Alumni Association'.

### Distribute Overpayment

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

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Next Payment</b>     | Select this option to deduct the amount of the overpayment from the next scheduled pledge payment. |

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Equally</b>          | Select this option to evenly distribute the overpayment throughout all remaining expected pledge payments.                 |
| <b>Ignore</b>           | 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.

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Next Payment</b>     | Select this option to add the amount of the underpayment to the next scheduled pledge payment. |
| <b>Equally</b>          | Select this option to evenly add the underpayment throughout all remaining pledge payments.    |

## Financials Link

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>SetID</b>            | 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.  |
| <b>Calendar ID</b>      | Select the default ID for the institutional calendar that determines the fiscal year.   |
| <b>Clearing Account</b> | 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 <i>credit</i> . When a refund is manually issued, this clearing account should be debited and the tender account should be credited. |

## Membership

| <i>Field or Control</i>          | <i>Description</i>  |
|----------------------------------|---|
| <b>Allow Gifts in Membership</b> | Enables you to enter additional gifts on the Membership Entry page.   |
| <b>Membership Days</b>           | <p>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.</p> <p>For example, a member organization resets membership every June 1, and you set the <b>Membership Days</b> 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.</p> |

## 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**).

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.

Institution Installation

Institution Installation 2

**Institution:** PSUNV PeopleSoft University

**Receipt**

**Event ID:**  CR Acknowledgements

|   |   |   |
|---|---|---|
| <div style="background-color: #4a7ebb; color: white; padding: 2px;"><b>Acknowledgement Priority</b></div> <p><b>Srvc Ind:</b> <input type="text" value="1"/></p> <p><b>Gift:</b> <input type="text" value="2"/></p> <p><b>Honor:</b> <input type="text" value="3"/></p> <p><b>Memory:</b> <input type="text" value="4"/></p> <p><b>Deceased:</b> <input type="text" value="5"/></p> | <div style="background-color: #4a7ebb; color: white; padding: 2px;"><b>Acknowledgement</b></div> <p><input type="checkbox"/> <b>Soft Credit</b></p> <p><input type="checkbox"/> <b>Adjusted Gift</b></p> <p><input type="checkbox"/> <b>Adjusted Pledge</b></p> | <div style="background-color: #4a7ebb; color: white; padding: 2px;"><b>Currency Default</b></div> <p><b>*Base Currency:</b> <input type="text" value="USD"/></p> <p><b>*Rate Type:</b> <input type="text" value="OFFIC"/></p> |
|   | <div style="background-color: #4a7ebb; color: white; padding: 2px;"><b>To Do List</b></div> <p><b>Reminder Days:</b> <input type="text" value="60"/></p>  | <div style="background-color: #4a7ebb; color: white; padding: 2px;"><b>Action Commitments</b></div> <p><b>Gift Days:</b> <input type="text" value="60"/></p> <p><b>Pledge Days:</b> <input type="text" value="60"/></p>       |

**Attachment Type**

**Attachment Type:**

## Receipt

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Event ID</b>         | 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

| <i>Field or Control</i>                  | <i>Description</i>  |
|--|---|
| <b>Soft Credit</b>                       | Select to send acknowledgement letters for soft credit.<br>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. |
| <b>Adjusted Gift and Adjusted Pledge</b> | Select to indicate that you want the system to generate acknowledgements for adjusted gifts or adjusted pledges.<br><br>If you select either of these two check boxes, the system generates acknowledgements for adjustments based on the rules from the Acknowledgement Setup2 page.<br>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

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Reminder Days</b>    | 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

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Base Currency</b>    | 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.       |
| <b>Rate Type</b>        | Select the exchange rate to use when translating amounts to the base currency. Examples of rate type are <i>Official Rate</i> , <i>Spot Market Rate</i> , and <i>Free Market Rate</i> . 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

| <i>Page Name</i>             | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>  |
|------------------------------|------------------------|--|---|
| Name Display Type            | SCC_NMD_TYP_TBL        | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; CR Common Definitions &gt; Name Display Type Setup</b> | Set the various display properties for a display name.                            |
| Name Display Type Parameters | SCC_NMD_TYP_PRM        | Click the <b>Edit Parameters</b> 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**).

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: *PABOLDBLUE*TEXT, *PABOLD*TEXT, *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).

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.

### Name Display Type Parameters

Name Display Type: DEMO STRONG      Effective Date: 04/21/2010  
 Description: Demo Strong      Style: STRONG

**Name Types** Find | View All    First 1 of 2 Last

\*Name Type: Preferred      \*Order: 1

\*Default Name Field: Use Formal Name

**Country Rules** Find | View All    First 1 of 1 Last

\*Format Using: English

Name Displays As: **Last, Prefix First Middle**

**Name Display Test** Customize | Find | View All    First 1-3 of 3 Last

| Displays As      | Test Emplid |   |   |
|------------------|-------------|---|---|
| Johnson, Devin M | 0043        | + | - |
| Gallegher, Shawn | AV0001      | + | - |
| Isenberg, Robin  | AV0002      | + | - |

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 Field

Use Name Display   
  Use Formal Name   
  Use Name   
  Use Name Parts

| Name Parts |              |            |              |            |   |
|------------|--------------|------------|--------------|------------|---|
| Part       | Part Type    | Name Field | User Defined | Dependency |   |
| 1          | Name Field   | Last       |              |            | + |
| 2          | User Defined |            | .            | 1          | + |
| 3          | Space        |            |              | 4          | + |
| 4          | Name Field   | Prefix     |              |            | + |
| 5          | Space        |            |              | 6          | + |
| 6          | Name Field   | First      |              |            | + |
| 7          | Space        |            |              | 8          | + |
| 8          | Name Field   | Middle     |              |            | + |

Ignore Rules

| Ignore Criteria |            |        |
|-----------------|------------|--------|
| Rule            | Name Field | Equals |
| 1               | Last       | *      |

## Name Types

| <i>Field or Control</i>   | <i>Description</i>   |
|---------------------------|--|
| <b>Name Type</b>          | 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 <b>Name Display Type</b> . <b>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.</b> |
| <b>Order</b>              | Rank the <b>Name Type</b> in the <b>Name Type</b> hierarchy for the <b>Name Display Type</b> . The system uses this hierarchy in the Display Name resolution process, and determines the particular name display options to use for a display name.  |
| <b>Default Name Field</b> | Select from three delivered options: <i>Use Formal Name</i> , <i>Use Name</i> , or <i>Use Name Display</i> . If no Country Rules are specified, the <b>Default Name Field</b> value is used to derive the <b>Display Name</b> .  |

## 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.

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Format Using</b>     | The system only displays Campus Solutions-supported countries in this list.   |
| <b>Test EmplID</b>      | 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.

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Part Type</b>        | <p>Available options are: <i>Name Field</i>, <i>Space</i>, or <i>User Defined</i>.</p> <p><i>Name Field</i>: contains values that are dependent on the selected country format such as First Name, Middle Name, Last Name.</p> <p><i>Space</i>: allows you to add a single space between other part types. Spaces can only be specified from Part 2 onward.</p> <p><i>User Defined</i>: allows you to define other characters (such as commas or periods), or a character string up to 35 characters long.</p> |
| <b>Name Field</b>       | The values that appear in this column are country-specific, based on your selection in the <b>Format Using</b> field.  |
| <b>Dependency</b>       | <p>Enter a number to specify a dependent <b>Part</b>, so that parts are only displayed when their dependent parts contain a value.</p> <p>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.</p>   |

## 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.

| <b>Page Name</b>   | <b>Page Title</b>                      |
|--------------------|--|
| 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                    |
| AV_MASS_PRSN_WS    | * Mass Assign Staff (workset version)  |
| AV_MASS_UNIT       | * Mass Assign Units                    |

| <b>Page Name</b>  | <b>Page Title</b>                          |
|-------------------|--|
| 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

| <b>Page Name</b> | <b>Definition Name</b> | <b>Navigation</b>   | <b>Usage</b>                                   |
|------------------|------------------------|---|--|
| Roles            | AV_PRPS_TBL            | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; CR Common Definitions &gt; Resources &gt; Roles</b> | Set up the resource roles at your institution. |

| <b>Page Name</b>                | <b>Definition Name</b>       | <b>Navigation</b>   | <b>Usage</b>   |
|---------------------------------|------------------------------|---|--|
| Define Staff, Define Volunteers | AV_STAFF_TBL                 | <ul style="list-style-type: none"> <li>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; CR Common Definitions &gt; Resources &gt; Staff</li> <li>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; CR Common Definitions &gt; Resources &gt; Volunteers</li> </ul> | 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<br>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**).

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

### Roles

**Role:** CM

Find | View All | First 1 of 1 Last

---

**Effective Date:** 01/01/1900 + -

**\*Status:** Active

**\*Description:** Campaign Manager

**Short Description:** Campaigns

**\*Purpose Type:** Assignment

Staff  
 Volunteer  
 Unit

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:

| <b>Code</b> | <b>Value</b>               | <b>Where Used</b>      | <b>Purpose</b>  |
|-------------|----------------------------|------------------------|---|
| <i>PM</i>   | Prospect Manager           | Prospect Management    | Only one prospect manager can be assigned to a constituent for a specific period. Assignment periods must be unique.  |
| <i>SOL</i>  | Solicitor                  | Prospect Management    | When assigning solicitors, only staff or volunteers who are identified as a solicitor appear as available values.   |
| <i>GPS</i>  | 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.                                 |
| <i>GE</i>   | 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.                                  |
| <i>GCA</i>  | Giving Club Administrator  | Giving Club Management | Only a user with this role can add members to a giving club.  |
| <i>MS</i>   | 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. |

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Purpose Type</b>     | Select <i>Administrative</i> when creating internal assignments, such as Gift and Pledge Supervisor, that are not used when assigning a resource to a prospect. Select <i>Assignment</i> , such as Prospect Manager, to assign a resource to a prospect. |
| <b>Staff</b>            | 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.   |
| <b>Volunteer</b>        | Select this check box to indicate that this role applies to volunteer resources.   |
| <b>Unit</b>             | 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**).

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.

**Define Staff**

Whitney, Christopher      **Staff ID:** AV0007      **Institution:** PSUNV

---

**Define Staff** Find | View All    First ◀ 1 of 1 ▶ Last

\*Effective Date:        \*Status: Active

Description:

Short Description:

End Date:

---

**Staff Roles** Find | View All    First ◀ 1 of 1 ▶ Last

\*Role

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

### Staff Roles

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Role</b>             | 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**).

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

### Units

**Unit Code:** ANNLGVG **Institution:** PSUNV

---

**Detail** Find | View All | First 1 of 1 Last

**Effective Date:** 01/01/1900 **Status:** Active

**\*Description:** Annual Giving

**Short Description:** Annual Gvg

**Department:** ADVANCEMNT University Advancement

---

**Unit Roles** Find | View All | First 1 of 1 Last

**\*Role** SOL

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*.

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Department</b>       | Select the department at your institution to which the unit belongs.<br><br><b>Note:</b> This field is optional and is provided for use in reports only. |

### Unit Roles

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Role</b>             | 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

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## 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.

| <i>Field or Control</i>   | <i>Description</i>  |
|---|---|
|  | <p>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.</p> <p>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.</p> |

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## 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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|------------------|------------------------|---|--|
| Manage Worksets  | AV_WORKSET             | <b>Contributor Relations &gt; Constituent Information &gt; Workset &gt; Manage Worksets</b> | Create or update worksets.   |
| Workset Members  | AV_WORKSET_MEMBERS     | <b>Contributor Relations &gt; Constituent Information &gt; Workset &gt; Workset Members</b> | Add constituents to or delete constituents from a workset.   |
| Join Worksets    | AV_WSET_JOIN           | <b>Contributor Relations &gt; Constituent Information &gt; Workset &gt; Join Worksets</b>   | 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       | <b>Contributor Relations &gt; Constituent Information &gt; Workset &gt; Build Worksets</b>  | 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**).

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.

The screenshot shows the 'Manage Worksets' interface. At the top, there's a 'Delete Workset' button. Below it, the 'Workset Code' is 'MYDNRS'. The '\*Description' is 'My Donors > \$5000'. The 'Short Description' is 'My Donors'. The 'Owner' is 'PS' (Locherty, Betty) and the 'Author' is 'PS' (Locherty, Betty). There's a 'Notes' field with a placeholder text: 'Enter notes about why the workset was created, perhaps the selection criteria.' To the right, there are summary statistics: 'Workset Status: Active', 'Workset Type: Dynamic', 'Total Organizations: 0', 'Total Persons: 0', and 'Total Members: 0'. Below this is the 'Workset Access' section with radio buttons for 'Private', 'Public', 'Security Role' (selected), and 'Staff Role'. Under 'Security Role', there's a 'Security Settings' table with columns for 'Role type', 'Security Role', 'Add/View Mbr', 'Delete Mbr', 'Build WS', and 'Delete WS'. The table has two rows: one for 'Security Ro' (CS - Fundraise) and one for 'User ID' (SAV2). Below that is the 'Workset Management Method' section with radio buttons for 'Manual' and 'Population Selection' (selected). Under 'Population Selection', there's a 'Selection Tool' dropdown set to 'PS Query' and a 'Query Name' field containing 'AV\_WRKSET\_GIFT'. There are also links for 'Launch Query Manager' and 'Preview Selection Results'.

| <b>Field or Control</b>  | <b>Description</b>  |
|--------------------------|---|
| <b>Workset Code</b>      | 10 character code for the workset.  |
| <b>Description</b>       | A free-text field that describes the contents of the workset.   |
| <b>Short Description</b> | The first 10 characters of the <b>Description</b> field. You can modify this text.  |
| <b>Owner</b>             | The person who owns the workset and is responsible for its upkeep.  |
| <b>Author</b>            | The UserID of the person who entered the workset members into the workset. If the UserID is different than the <b>Owner</b> , then both the author and owner have edit access to the workset. |
| <b>Notes</b>             | Provides further information about the purpose of the workset.  |

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Workset Status</b>   | Indicates whether the workset is <i>Active</i> or <i>Inactive</i> . Generally, worksets are active.  |
| <b>Workset Type</b>     | 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). |
| <b>Total Members</b>    | The number of records in the workset.  |

## Workset Access

There are four ways to provide access to a workset:

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Private</b>          | Only the owner or author can view and edit it.  |
| <b>Public</b>           | Everyone can view the workset. Only the owner or author can edit or delete it.                  |
| <b>Security Role</b>    | Select the specific Campus Solutions Security Roles or UserIDs that have access to the workset. |
| <b>Staff Role</b>       | 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:

| <b>Field or Control</b>      | <b>Description</b>   |
|------------------------------|--|
| <b>View Only</b>             | The user may only view and use the workset but may not add or delete any of its constituents.                |
| <b>Add/View Mbr (member)</b> | The user may add constituents to the workset and use it, but may not delete any of its constituents.         |
| <b>Delete Mbr (member)</b>   | The user may be assigned <b>Delete Mbr</b> access only if <b>Add/View Mbr</b> access has also been assigned. |

| <b>Field or Control</b>    | <b>Description</b>   |
|----------------------------|--|
| <b>Build WS</b> (workset)  | The user has access to the Build Workset page and may build worksets to which they have security access.   |
| <b>Delete WS</b> (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**.

| <b>Method</b> | <b>Description</b>   |
|---------------|--|
| <b>Manual</b> | 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.<br><br>See “Managing Workset Members” |

| <b>Method</b>                      | <b>Description</b>   |
|------------------------------------|--|
| <p><b>Population Selection</b></p> | <p>Select this option to use flexible methods to create worksets. This group box appears when you select the Population Selection process.</p> <p>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.</p> <p>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.</p> <hr/> <p><b>Warning!</b> 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.</p> <hr/> <p>See <i>Campus Community 9.2 Fundamentals</i>, “Using the Population Selection Process”</p> |

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**).

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.

Manage Worksets
Workset Members

|  |                               |
|--|-------------------------------|
| <b>Workset Code:</b> MYDNRS  | <b>Workset Type:</b> Dynamic  |
| <b>Description:</b> My Donors > \$5000                                 | <b>Author:</b> Locherty,Betty |
| <b>Owner:</b> Locherty,Betty   | <b>Total Org Mbrs:</b> 6      |
| <b>Notes:</b> <input style="width: 200px; height: 20px;" type="text"/> | <b>Total Per Mbrs:</b> 3      |
|  | <b>Total Members:</b> 9       |

| Workset Detail |              |         |                                |                |                       | Personalize   Find   View All | First 1-9 of 9 Last |
|----------------|--------------|---------|--------------------------------|----------------|-----------------------|-------------------------------|---------------------|
| #              | ID Type      | ID      | Name                           | Saved By       | Date and Time         |                               |                     |
| 1              | Organization | AV4140  | Mullett's Barber Shoppe        | Locherty,Betty | 10/18/2013 12:42:34PM | +                             | -                   |
| 2              | Organization | AV4150  | Frank & Bill's Poi Shack       | Locherty,Betty | 10/18/2013 12:42:34PM | +                             | -                   |
| 3              | Organization | AV4160  | Douglas Seafood Emporium       | Locherty,Betty | 10/18/2013 12:42:34PM | +                             | -                   |
| 4              | Organization | SAC0012 | Genesis International          | Locherty,Betty | 10/18/2013 12:42:34PM | +                             | -                   |
| 5              | Organization | SAC0013 | Ramesy, Riley & Roscoe Cnsitng | Locherty,Betty | 10/18/2013 12:42:34PM | +                             | -                   |
| 6              | Organization | SAC0016 | Mindspeed Incorporated         | Locherty,Betty | 10/18/2013 12:42:34PM | +                             | -                   |
| 7              | Person       | AV0036  | Sargent,Russell                | Locherty,Betty | 10/18/2013 12:42:34PM | +                             | -                   |
| 8              | Person       | AV0040  | Heller,Miranda                 | Locherty,Betty | 10/18/2013 12:42:34PM | +                             | -                   |
| 9              | Person       | AV0044  | Llendo,Ramon                   | Locherty,Betty | 10/18/2013 12:42:34PM | +                             | -                   |

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.

| <b>Field or Control</b>           | <b>Description</b>  |
|-----------------------------------|---|
| <b>ID Type and ID</b>             | Select the <b>ID Type</b> and <b>ID</b> for each constituent to include in the workset.                     |
| <b>Saved By and Date and Time</b> | 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**).

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.

**Join Worksets**

**Workset To Be Built**

**Workset Code:**

**Description:**

**Method:**

**Worksets To Be Joined**

**Workset Code:**   People

**Workset Code:**   Orgs

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

### Workset To Be Built

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Workset Code</b>     | Select the code for the first workset in the set to join. You define workset codes when you create a workset.  |
| <b>Description</b>      | The description of the workset that appears when you press TAB from the <b>Workset Code</b> field. The resulting joined workset inherits the name of the workset that you select.  |
| <b>Method</b>           | <p>Select a method for joining the two worksets.</p> <p><i>Add:</i> Select to add the records in the selected workset to the records in another workset without excluding any records.</p> <p><i>Exclusive:</i> Select to remove nonmatching records from both worksets.</p> |
| <b>Build</b>            | Click to create the workset.   |

## Worksets To Be Joined

| <i>Field or Control</i> | <i>Description</i>                             |
|-------------------------|--|
| <b>Workset Code</b>     | 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" (Campus Community Fundamentals)

"Setting Up Service Indicator Codes and Reasons" (Campus Community Fundamentals)

## 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

| <i>Page Name</i>                     | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|--------------------------------------|------------------------|---|---|
| Send Notification                    | PT_WF_NOTIFY           | Click the <b>Notify</b> 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_NOTIFY_LOOKUP    | Click the <b>Lookup Recipient</b> link on the Send Notification page.           | Create an email recipient list or search for email addresses. |
| Send Notification - Delivery Options | PT_WF_NOTIFY_DOPTNS    | Click the <b>Delivery Options</b> 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:

| <b>Area</b>                 | <b>Functionality</b>   |
|-----------------------------|--|
| Persons and Organizations   | <p>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.</p> <p>The Person Profile and Organization Profile pages list the attachments created for the constituent where they can be subsequently downloaded and viewed on demand.</p> |
| 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](#)

[Creating Initiative Attachments](#)

[Understanding Planned Giving Prospect Management](#)

## Chapter 4

# Setting Up Constituent Data

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## 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?

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**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.

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## 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:

| <b>Code</b> | <b>Value</b>                |
|-------------|-----------------------------|
| 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      |

| <b>Code</b> | <b>Value</b>            |
|-------------|-------------------------|
| 15          | Association             |
| 16          | Religious Organization  |
| 17          | Government              |
| 18          | Government Foundation   |
| 19          | Other Organization Type |

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

## Page Used to Define Constituent Types

| <b>Page Name</b>         | <b>Definition Name</b> | <b>Navigation</b>  | <b>Usage</b>  |
|--------------------------|------------------------|--|---|
| Define Constituent Types | AV_CTYP_CD_TBL         | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Constituent Information &gt; Constituent Types</b> | 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.

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>ID Type</b>          | Specify whether this constituent type applies to people or organizations. Available options are <i>Person</i> and <i>Org ID</i> . If a constituent type can apply to both people and organizations, enter the constituent type twice, selecting <i>Person</i> for one ID type, and then selecting <i>Org ID</i> 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

| <i>Page Name</i>       | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|------------------------|------------------------|---|---|
| Involvement Categories | AV_INVLV_C_TBL         | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Constituent Information &gt; Involvement Categories</b> | 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:

| <i>Code</i> | <i>Value</i>      |
|-------------|-------------------|
| <b>CHAR</b> | <i>Charitable</i> |

## 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

| <i>Page Name</i>  | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>  |
|-------------------|------------------------|--|---|
| Involvement Types | AV_INVLV_T_TBL         | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Constituent Information &gt; Involvement Types</b> | 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.

| <i>Field or Control</i>    | <i>Description</i>   |
|----------------------------|--|
| <b>Use Date Received</b>   | 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.<br>If you select this check box, the <b>Date Received</b> field on the Involvement page is available for input and the <b>Start Date</b> and <b>End Date</b> fields are not available for input. |
| <b>Use Start/End Dates</b> | 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 <b>Start Date</b> and <b>End Date</b> fields on the Involvement page are available for input and the <b>Date Received</b> 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

| <i>Page Name</i>  | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|-------------------|------------------------|--|--|
| Involvement Codes | AV_INVLV_CD_TBL        | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Constituent Information &gt; Involvement Codes</b> | 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**).

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.

| <i>Field or Control</i>             | <i>Description</i>   |
|-------------------------------------|--|
| <b>Valid Involvement Types</b>      | Select the involvement types that can use this involvement code. Involvement Types to choose from include <i>Interest, Activity, Affiliation, Award, and Honor</i> , as well as any institution-defined involvement types. |
| <b>Valid Involvement Categories</b> | Select the involvement categories to which the involvement code applies.   |

## Related Links

[Defining Involvement Types](#)

[Defining Involvement Categories](#)

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## 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

| <i>Page Name</i>         | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|--------------------------|------------------------|---|---|
| Person/Org Relationships | AV_PE_RELATION_TBL     | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Constituent Information &gt; Person/Org Relationships</b> | 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**).

| <i>Field or Control</i>   | <i>Description</i>   |
|---------------------------|--|
| <b>Person Description</b> | 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 <i>Trustee</i> .       |
| <b>Org Description</b>    | 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 <i>Trustee</i> . |

**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

| <i>Page Name</i>        | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|-------------------------|------------------------|---|---|
| Reciprocal Relationship | AV_ORG_RELATE_TBL      | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Constituent Information &gt; Org Reciprocal Relationships</b> | 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**).

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 Relationship**

**Relationship:**      Subsidiary

---

Find | View All    First 1-3 of 3 Last

| Reciprocal Relation: | Default:                            |     |
|----------------------|-------------------------------------|-----|
| Parent Company       | <input checked="" type="checkbox"/> | + - |
| Corporate Foundation | <input type="checkbox"/>            | + - |
| Branch               | <input type="checkbox"/>            | + - |

| <i>Field or Control</i>    | <i>Description</i>   |
|----------------------------|--|
| <b>Reciprocal Relation</b> | Select the valid relations that can be reciprocal to this relationship.                            |
| <b>Default</b>             | 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" (Campus Community Fundamentals)

## Setting Up Attachment Types

This section discusses how to define attachment types.

### Page Used to Set Up Attachment Types

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|------------------|------------------------|---|--|
| Attachment Types | AV_ATCH_TYPE           | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; CR Common Definitions &gt; Attachment Types</b> | 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

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## 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\_CNTR\_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

| <i>Page Name</i>    | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|---------------------|------------------------|--|--|
| Assets              | AV_ASSET_TBL           | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Prospect Management &gt; Asset Types</b>                         | Define the types of assets that your institution tracks.                   |
| Rating Type         | AV_R_TYPE_TBL          | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Prospect Management &gt; Rating Type</b>                         | Define the valid rating types to track.                                    |
| Rating Origin       | AV_R_ORIGIN_TBL        | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Prospect Management &gt; Rating Origin</b>                       | Define where the rating indicator or category was originated.              |
| Rating Categories   | AV_R_CAT_TBL           | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Prospect Management &gt; Rating Categories</b>                   | Define the types of prospect ratings to track.                             |
| Rating Indicators   | AV_R_IND_TBL           | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Prospect Management &gt; Rating Indicators</b>                   | Define the indicators that you use to measure the rating of a constituent. |
| Action Types        | AV_ACTN_TYPE_TBL       | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; CR Common Definitions &gt; Actions &gt; Action Types</b>         | Define the action types that your institution uses.                        |
| Action Contact Type | AV_ACTN_CNTC_TBL       | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; CR Common Definitions &gt; Actions &gt; Action Contact Types</b> | Define the valid contact types for actions or volunteer assignments.       |
| Action Status Codes | AV_ACTN_STAT_TBL       | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; CR Common Definitions &gt; Actions &gt; Action Status Codes</b>  | Define the valid statuses for prospect actions.                            |

| <b>Page Name</b>         | <b>Definition Name</b> | <b>Navigation</b>  | <b>Usage</b>  |
|--------------------------|------------------------|--|---|
| Action Results           | AV_ACTN_RSLT_TBL       | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; CR Common Definitions &gt; Actions &gt; Action Results</b>   | Define the valid results for actions.   |
| Donor Appreciation Items | AV_ITEM_TBL            | <ul style="list-style-type: none"> <li>• <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; CR Common Definitions &gt; Appreciation Items</b></li> <li>• <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Prospect Management &gt; Appreciation Items</b></li> </ul> | Define the various items of appreciation that constituents receive throughout the cultivation and membership process. |
| Trust Types              | AV_TRUST_T_TBL         | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Prospect Management &gt; Trust Types</b>   | Define the valid types of trusts at your institution.   |
| Trust Categories         | AV_TRUST_C_TBL         | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Prospect Management &gt; Trust Categories</b>  | Define the valid categories for trusts at your institution.   |
| Trust Terms              | AV_TRUST_R_TBL         | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Prospect Management &gt; Trust Terms</b>   | 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**).

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**

Rating Category: GIFTCP

Find | View All First 1 of 1 Last

\*Effective Date: 01/01/1900 \*Status: Active

\*Rating Origin: INST

\*Description: Gift Capacity

Short Description: Gift Capac Create a New Indicator

**Valid Indicators**

| Indicator | Value Range               |
|-----------|---------------------------|
| DM3       | \$1,000,000 - \$1,499,999 |

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*.

| Field or Control | Description   |
|------------------|---|
| 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 <i>Survey Results</i> , only those ratings indicators pertinent to surveys would be valid indicators. |

| <b>Field or Control</b>       | <b>Description</b>   |
|-------------------------------|--|
| <b>Create a New Indicator</b> | 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*.

| <b>Field or Control</b>            | <b>Description</b>  |
|------------------------------------|---|
| <b>Valid Values</b>                | 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.  |
| <b>Valid Value and Description</b> | 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. |
| <b>Vendor Code</b>                 | 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**).

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.

| <b>Field or Control</b>     | <b>Description</b>  |
|-----------------------------|---|
| <b>Valid Result Codes</b>   | 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. |
| <b>Add All Result Codes</b> | 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:

| <b>Code</b> | <b>Value</b> |
|-------------|--------------|
| ASK         | Ask          |

| <b>Field or Control</b>   | <b>Description</b>  |
|---------------------------|---|
| <b>Action Type Code</b>   | Displays the code for the action type.<br><hr/> <b>Note:</b> This value comes from the ACTN_TYPE_CD field in the AV_ACTN_TYP_TBL table. <hr/> |
| <b>Constituent Action</b> | Select if the action type applies to actions that are associated with prospects or constituents.  |
| <b>Initiative Action</b>  | 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**).

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.

### Action Contact Type

**Contact Type Code:** PHONE

Find | View All First 1 of 1 Last

|                           |   |
|---------------------------|---|
| <b>*Effective Date:</b>   | 01/01/1900 <span style="font-size: x-small;">31</span>  |
| <b>*Status:</b>           | Active <span style="font-size: x-small;">▼</span>   |
| <b>*Description:</b>      | Telephone Call  |
| <b>Short Description:</b> | Phone Call  |
|                           | <input checked="" type="checkbox"/> <b>Constituent Action</b><br><input checked="" type="checkbox"/> <b>Initiative Action</b><br><input checked="" type="checkbox"/> <b>Volunteer</b> |

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.

| <i>Field or Control</i>   | <i>Description</i>  |
|---------------------------|---|
| <b>Constituent Action</b> | Select if the contact type applies to prospect actions.                                 |
| <b>Initiative Action</b>  | Select if the contact type applies to actions that are generated through an initiative. |
| <b>Volunteer</b>          | 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**).

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:

| <i>Code</i> | <i>Value</i>    |
|-------------|-----------------|
| <b>CMP</b>  | <i>Complete</i> |

| <b>Code</b> | <b>Value</b>     |
|-------------|------------------|
| SCH         | <i>Scheduled</i> |

| <b>Field or Control</b>   | <b>Description</b>   |
|---------------------------|--|
| <b>Constituent Action</b> | Select if the action status applies to prospect actions.                                 |
| <b>Initiative Action</b>  | 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**).

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.

**Action Results**

**Result Code:** DECL

---

Find | View All
First ◀ 1 of 1 ▶ Last

\*Effective Date: 01/01/1900 + -

\*Status: Active ▼

\*Description: Declined

Short Description: Declined

Constituent Action

Initiative Action

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.

| <b>Field or Control</b>   | <b>Description</b>  |
|---------------------------|---|
| <b>Constituent Action</b> | Select if the action result applies to prospect actions. Examples include accepted, proposal presented, gift, pledge, and declined. |

| <b>Field or Control</b>  | <b>Description</b>  |
|--------------------------|---|
| <b>Initiative Action</b> | 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:

| <b>Code</b>   | <b>Value</b>    |
|---------------|-----------------|
| <b>DECL</b>   | <i>Declined</i> |
| <b>GIFT</b>   | <i>Gift</i>     |
| <b>PLEDGE</b> | <i>Pledge</i>   |

**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).

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**

SetID: MODEL                      Item Code: AER01

Find | View All    First ◀ 1 of 1 ▶ Last

\*Effective Date: 01/01/1900

\*Status: Active

\*Item Description: Aerial Photo of Campus

Item Value:  Currency Code: USD

\*Item Category: Donor Appreciation

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.

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Item Category</b>    | <p>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.</p> <hr/> <p><b>Note:</b> 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.</p> <hr/> |



## 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" (Campus Solutions 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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>                                  |
|------------------|------------------------|--|---|
| Initiative Types | AV_INTV_TYPE_TABLE     | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Initiatives &gt; Initiative Type Table</b> | 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:

| <i>Code</i> | <i>Value</i> |
|-------------|--------------|
| CAMPAIGN    | Campaign     |
| EVENT       | Event        |
| VOLUNTEER   | Volunteer    |

| <b>Code</b> | <b>Value</b>     |
|-------------|------------------|
| 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

| <b>Page Name</b>  | <b>Definition Name</b> | <b>Navigation</b>  | <b>Usage</b>  |
|-------------------|------------------------|--|---|
| Attribute Type    | AV_ATTR_TYP_TBL        | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Initiatives &gt; Attribute Type</b>    | 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            | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Initiatives &gt; Audience Criteria</b> | Create selection criteria statements or statements that provide the variables needed to identify qualified audience members when a COBOL process is run.<br>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**).

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.

**Attribute Type**

**Attribute Code:** INVLV **Person / Organization:** Person

---

**Attribute Type** Find | View All First 1 of 1 Last

**\*Effective Date:**

**\*Status:**

**Description:**

**Short Description:**

**Attribute Prompt Table:**

**\*Attribute Process Table:**  [Attribute Field](#) INVLV\_CD

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.

| <i><b>Field or Control</b></i> | <i><b>Description</b></i>  |
|--------------------------------|--|
| <b>Attribute Prompt Table</b>  | <p>Enter a table or view name, which the system uses to populate the options in the <b>Valid Value</b> field on the Audience Criteria page. If you leave this field blank, the <b>Valid Value</b> 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.</p> <p>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.</p> |
| <b>Attribute Process Table</b> | <p>Enter a table name. This table contains the attribute that appears on the constituent's record.</p>   |

**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.

| <i><b>Field or Control</b></i> | <i><b>Description</b></i>   |
|--------------------------------|---|
| <b>Attribute Field</b>         | <p>Click this link to select the actual field in the process table where the attribute resides on a constituent's record.</p> |

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

| <b>Type</b>                    | <b>Maximum Field Length</b> |
|--------------------------------|-----------------------------|
| Character                      | 15                          |
| Number                         | 10                          |
| Signed Number (decimal fields) | 12.2                        |
| Date                           | 10                          |

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

### Example

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

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

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.

**Attribute Type**

**Attribute Code:** WRKSET **Person / Organization:** Person

---

**Attribute Type** Find | View All First 1 of 1 Last

\*Effective Date: 06/06/2006 + -

\*Status: Active

Description: Workset Members

Short Description: Worksets

Attribute Prompt Table: AV\_WORKSET\_SRCH

\*Attribute Process Table: AV\_WORKSET\_MBR [Attribute Field](#) WORKSET\_CD

## 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.

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.

### Audience Criteria

**Audience Code:** ENGLISH      **Pers/Org:** Person      **Institution:** PSUNV

**Audience Detail** Find | View All    First 1 of 1 Last

**\*Effective Date:** 01/01/1900       
 **\*Status:** Active      
  **Approved**

**Description:**

**Selection Process**

Population Selection     
  **Build/Merge Process**

**Selection Criteria** Find | View All    First 1-6 of 6 Last

| (                                   | Attribute Type | Oper | Valid Value          | Range                    | Valid From | Valid To | ) | Logical                             |   |
|-------------------------------------|----------------|------|----------------------|--------------------------|------------|----------|---|-------------------------------------|---|
| <input type="checkbox"/>            | CNSTIT         | =    | <input type="text"/> | <input type="checkbox"/> |            |          |   | <input type="checkbox"/> And        | <input type="button" value="+"/> <input type="button" value="-"/> |
| <input checked="" type="checkbox"/> | ACPLAN         | =    | ENG-MIN              | <input type="checkbox"/> |            |          |   | <input type="checkbox"/> Or         | <input type="button" value="+"/> <input type="button" value="-"/> |
| <input type="checkbox"/>            | ACPLAN         | =    | ENG-QTR              | <input type="checkbox"/> |            |          |   | <input type="checkbox"/> Or         | <input type="button" value="+"/> <input type="button" value="-"/> |
| <input type="checkbox"/>            | ACPLAN         | =    | ENGL-BA              | <input type="checkbox"/> |            |          |   | <input type="checkbox"/> Or         | <input type="button" value="+"/> <input type="button" value="-"/> |
| <input type="checkbox"/>            | ACPLAN         | =    | ENGL-MA              | <input type="checkbox"/> |            |          |   | <input type="checkbox"/> Or         | <input type="button" value="+"/> <input type="button" value="-"/> |
| <input type="checkbox"/>            | ACPLAN         | =    | ENGL-PHD             | <input type="checkbox"/> |            |          |   | <input checked="" type="checkbox"/> | <input type="button" value="+"/> <input type="button" value="-"/> |

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 Criteria

**Audience Code:** ENGLISH      **Pers/Org:** Person      **Institution:** PSUNV

**Audience Detail** Find | View All    First 1 of 2 Last

**\*Effective Date:** 06/13/2006       
 **\*Status:** Active      
  **Approved**

**Description:**

**Selection Process**

**Population Selection**     
  Build/Merge Process

**Population Selection**

**Selection Tool**

**File Path and Name**

**File Mapping**   [Create File Mapping](#)

## Audience Detail Common Fields

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Approved</b>         | <p>Select to indicate that the audience criteria is approved for use. Select only if you have completed the test search (by clicking the <b>Test Search</b> button) and are sure that you entered the selection criteria correctly.</p> <hr/> <p><b>Important!</b> The audience that you define appears as an Audience option when assigning an audience to an initiative or member organization, if you selected the <b>Approved</b> check box.</p> <hr/> |
| <b>Description</b>      | <p>Enter a descriptive name for the audience. You can enter up to 60 characters in this field. This is a required field.</p>   |

### 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" (Campus Community Fundamentals)

### 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.

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| (                       | 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.                  |
| <b>Attribute Type</b>   | Select an attribute type.<br><br>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.<br><br>See <a href="#">Defining Audiences</a> .  |
| <b>Oper</b> (operator)  | Select an operator for the selection criteria statement. Values are: =, <, <=, <>, >, and >=.<br><br>= includes all constituents with the attribute on their records.<br><br><> includes all constituents without the attribute on their records.<br><br>Use <, <=, >, and >= to select a range, such as for an attribute of gift amount or postal code. |
| <b>Valid Value</b>      | 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 <b>Range</b> check box and enter the valid from and valid to range for the attribute in the <b>Valid From</b> and <b>Valid To</b> fields.                         |
| )                       | Select to indicate the end of a selection criteria statement.  |
| <b>Logical</b>          | Select <i>(AND)</i> to indicate that both attribute types are required or <i>(OR)</i> to indicate that either attribute type is acceptable.  |
| <b>Test Search</b>      | 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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|------------------|------------------------|--|--|
| Goal Types       | AV_GOAL_TYPE_TABLE     | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Initiatives &gt; Goal Type Table</b> | 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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|------------------|------------------------|---|---|
| Methods          | AV_METHOD_TABLE        | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Initiatives &gt; Method Table</b> | 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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>                                       |
|------------------|------------------------|---|--|
| Budget Table     | AV_BUDGET_TABLE        | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Initiatives &gt; Budget Table</b> | 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\_APEAL\_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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|------------------|------------------------|---|---|
| Appeal Types     | AV_APEAL_TYPE_TBL      | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Initiatives &gt; Appeal Type Table</b>                    | 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           | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Initiatives &gt; Appeal Code Table</b>                    | Set up appeals or specific activities that generate commitments at the institution.   |
| Appeal Detail    | AV_MTVTN2_TBL          | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Initiatives &gt; Appeal Code Table &gt; Appeal Detail</b> | 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**).

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

The screenshot shows the 'Appeal' page with the following details:

- SetID:** MODEL
- Appeal Code:** ALUMAN
- Effective Date:** 01/01/1900
- Status:** Active
- Description:** Alumni Annual Membership Appea
- Short Description:** Alumni Ann
- Appeal Type:** Phonathon
- Checkboxes:**
  - Campaign Appeal
  - Membership Appeal
  - Event Appeal
  - Volunteer Appeal
  - Other Appeal

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

| <b>Field or Control</b>  | <b>Description</b>  |
|--------------------------|---|
| <b>Appeal Type</b>       | Select a vehicle that is used to communicate the appeal, such as phonathon, direct mail, and so on. |
| <b>Campaign Appeal</b>   | Select to indicate that this appeal is a campaign appeal.   |
| <b>Event Appeal</b>      | Select to indicate that this appeal is an event appeal.   |
| <b>Membership Appeal</b> | Select to indicate that this appeal is a membership appeal.   |
| <b>Volunteer Appeal</b>  | Select to indicate that this appeal is a volunteer appeal.  |
| <b>Other Appeal</b>      | 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**).

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.

The screenshot shows the 'Appeal Detail' page. At the top, there are tabs for 'Appeal' and 'Appeal Detail'. Below the tabs, the 'SetID' is 'MODEL' and the 'Appeal Code' is 'ALUMAN'. There are navigation controls: 'Find | View All', 'First', '1 of 1', and 'Last'. The main form contains the following fields:

- Effective Date:** 01/01/1900
- Status:** Active
- Appeal Goal:** 250,000.00 USD
- Start Date:** 08/28/2000
- Number of Pieces:** 0
- End Date:** (empty)
- Appeal Budget:** 0.00

Below the form is a table with the following data:

| Institution | Initiative Type | Initiative |                  |
|-------------|-----------------|------------|------------------|
| PSUNV       | MEMBERSHIP      | MBRPHONE   | Member Phonathon |

| <i>Field or Control</i>               | <i>Description</i>   |
|---------------------------------------|--|
| <b>Appeal Goal</b>                    | Enter the amount of revenue that you expect this appeal to generate.   |
| <b>Number of Pieces</b>               | 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. |
| <b>Appeal Budget</b>                  | Enter the overall expense budget for the appeal.   |
| <b>Institution</b>                    | Select the institution associated with the initiative.   |
| <b>Initiative Type and Initiative</b> | 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

| <i>Page Name</i>  | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|-------------------|------------------------|---|---|
| Donor Phase Table | AV_DONOR_PHASE_TBL     | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Initiatives &gt; Campaign Donor Phase Table</b> | 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      | <b>Contributor Relations &gt; Initiatives &gt; Campaign Initiatives &gt; Manage Campaigns &gt; Gift Table</b>       | Estimate the number of donors and prospects that you need at each gift level to reach a campaign goal.  |
| Reporting Rules   | AV_CAMPAIGN_TABLE      | <b>Contributor Relations &gt; Initiatives &gt; Campaign Initiatives &gt; Manage Campaigns &gt; Reporting Rules</b>  | Define the rules used in reporting campaign activity to the Council for the Advancement and Support of Education (CASE).<br><br>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**).

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.

### Gift Table

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

---

**Gift Table** Find | View All    First ◀ 1 of 1 ▶ Last

\*Eff Date: 06/05/2006                        Status: Active

Created by: KU0007                        Locherty, Betty

---

**Gift Table Detail** Find | View All    First ◀ 1-2 of 2 ▶ Last

| *Donor Phase     | *Gift Level  | *Nbr Donors | Nbr Prspcts | Total        |   |
|------------------|--------------|-------------|-------------|--------------|---|
| Leadership Gifts | 1,000,000.00 | 5           | 10          | 500,000.00   | <input type="button" value="+"/> <input type="button" value="-"/> |
| General Campaign | 200,000.00   | 3,000       | 10,000      | 1,000,000.00 | <input type="button" value="+"/> <input type="button" value="-"/> |

---

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

| <i>Field or Control</i>                  | <i>Description</i>   |
|--|--|
| <b>Created By</b>                        | 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.   |
| <b>Donor Phase</b>                       | Select which section of the campaign, such as <i>Major Gifts</i> , <i>Leadership Gifts</i> , <i>Special Gifts</i> , or <i>General Campaign</i> is being defined in the gift table. Donor phases are defined by your institution.                       |
| <b>Gift Level</b>                        | 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.                  |
| <b>Nbr Donors</b> (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. |
| <b>Nbr Prspcts</b> (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.  |
| <b>Total</b>                             | Enter the amount expected from the gift level.   |
| <b>Financial Goal</b>                    | Displays the financial goal of a campaign.   |

| <i>Field or Control</i> | <i>Description</i>                    |
|-------------------------|---------------------------------------|
| <b>Gift Table Total</b> | Displays the sum of the Total column. |

## Example

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

| <i>Phase</i>     | <i>Gift Level (USD)</i> | <i>Nbr Donors</i> | <i>Nbr Prosp</i> | <i>Total (USD)</i> |
|------------------|-------------------------|-------------------|------------------|--------------------|
| 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**).

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.

### Reporting Rules

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

|  |   |   |
|--|---|---|
| <b>Length of Cmpgn Period</b><br>Years:                      1<br>Months:                      0   | <b>Maximum Pledge Payment Period</b><br><input type="radio"/> 1 Year<br><input type="radio"/> 2 Years<br><input checked="" type="radio"/> 3 Years<br><input type="radio"/> 4 Years<br><input type="radio"/> 5 Years<br><input type="radio"/> Other (Please Explain)<br><div style="border: 1px solid gray; height: 20px; width: 100%;"></div> | <b>Bequests</b><br><input type="radio"/> Include Bequests<br><input checked="" type="radio"/> Include Bequests by Exception   |
| <b>Campaign Scope</b><br><input checked="" type="radio"/> Single Unit<br><input type="radio"/> Multiple Units<br><input type="radio"/> Comprehensive |   | <b>Life Insurance</b><br><input checked="" type="radio"/> Do Not Include Life Insurance<br><input type="radio"/> Cash Surrender Value Only<br><input type="radio"/> Face Value/Present Value<br><input type="radio"/> Realized Death Benefit Only |

**Advance-Gifts Phase in Totals**  
 Featured Objectives Only                       All Gifts Rcvd by Institution

**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

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Single Unit</b>      | Select to have only one unit (school, center) reflected in the campaign scope.  |
| <b>Multiple Units</b>   | Select to have more than one but not all units reflected in the campaign scope. |
| <b>Comprehensive</b>    | 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

| <b>Field or Control</b>              | <b>Description</b>   |
|--------------------------------------|--|
| <b>Include Bequests</b>              | Select this option to include in campaign totals only those bequests that meet the following criteria: <ul style="list-style-type: none"> <li>• 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.</li> <li>• A written commitment to the institution must be on file.</li> </ul> |
| <b>Include Bequests by Exception</b> | 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.

| <b>Field or Control</b>            | <b>Description</b>  |
|------------------------------------|---|
| <b>Cash Surrender Value</b>        | Select to have the life insurance counted as a current outright gift.   |
| <b>Face Value/Present Value</b>    | Select to have the life insurance reported as deferred gifts.   |
| <b>Realized Death Benefit Only</b> | Select to have the life insurance reported in campaign totals if they have not been reported in another campaign. |

## Advance-Gifts Phase in Totals

| <b>Field or Control</b>  | <b>Description</b>   |
|--|--|
| <b>Featured Objectives Only</b>  | Select this option to include in campaign totals only those gifts received by the institution in support of the campaign or its related initiatives. |
| <b>All Gifts Rcvd by Institution</b> (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

| <i>Page Name</i>    | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|---------------------|------------------------|---|--|
| Membership Type     | AV_MBR_TYP_PNL         | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Membership Organizations &gt; Membership Type</b>     | Define the various types of memberships that constituents can have with a member organization. |
| Membership Category | AV_MBR_CAT_PNL         | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Membership Organizations &gt; Membership Category</b> | 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:

| <i>Code</i> | <i>Value</i> |
|-------------|--------------|
| 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

| <i>Field or Control</i>           | <i>Description</i>  |
|-----------------------------------|---|
| <b>Role</b>                       | Select the overall function needed for each position in the leadership structure. Your institution defines roles.   |
| <b>Nbr Needed</b> (number needed) | Enter the number of volunteers needed in the role or capacity that you selected.  |
| <b>Term Length</b>                | Select the expected length of service for volunteers serving in this capacity. The values <i>Less Than One Year</i> and <i>1-15 Years</i> are delivered with the system. The default value for this field is <i>Less Than One Year</i> .<br><br>Values for this field are delivered with the system as translate values. You can modify these translate values. |
| <b>Selection Process</b>          | Indicate whether volunteers are elected or appointed to the position. This default value for this field is <i>Appointed</i> .   |

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Required</b>         | 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

| <i>Page Name</i>       | <i>Definition Name</i>             | <i>Navigation</i>  | <i>Usage</i>   |
|------------------------|------------------------------------|--|--|
| Area of Responsibility | AV_AREA_TYP_TBL                    | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Initiatives &gt; CR Volunteers &gt; Areas of Responsibility</b>  | Define the valid areas of accountability assigned to volunteers.   |
| Assignment Type        | AV_ASGN_TYP_TBL                    | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Initiatives &gt; CR Volunteers &gt; Assignment Types</b>   | Define the valid types of volunteer assignments.   |
| Leadership Types       | AV_LDR_TYPE_TBL                    | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Initiatives &gt; CR Volunteers &gt; Leadership Types</b>   | 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                   | <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Manage Volunteer Initiatives &gt; Volunteer Goals</b>  | Set up intermediate goals or milestones for an initiative.   |
| Volunteer Structure    | AV_VOL_LDR_GRP<br>AV_VOL_LDR_GRP_M | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Initiative Volunteers &gt; Initiative Volunteer Structure</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Membership Org Volunteers &gt; Member Org Volunteer Structure</b></li> </ul> | Define the overall leadership group for an initiative or a member organization.  |

| <b>Page Name</b> | <b>Definition Name</b> | <b>Navigation</b>  | <b>Usage</b>   |
|------------------|------------------------|--|--|
| Sub-Groups       | AV_VOL_SUB_GRP         | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Initiative Volunteers &gt; Initiative Volunteer Sub-Group</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Membership Org Volunteers &gt; Member Org Volunteer Sub-Group</b></li> </ul> | 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**).

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.

The screenshot shows the 'Assignment Type' page with the following details:

- Assignment Type:** LEGIS
- Effective Date:** 01/01/1900 (with a calendar icon)
- Status:** Active (dropdown menu)
- Description:** Legislative (text input field)
- Short Description:** Legislativ (text input field)
- Area of Responsibility:** Congress Members (dropdown menu)

The interface includes navigation controls such as 'Find | View All', 'First', '1 of 1', and 'Last' at the top of the main and sub-sections.

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

| <i>Field or Control</i>       | <i>Description</i>  |
|-------------------------------|---|
| <b>Area of Responsibility</b> | 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 <i>Student Recruitment</i> , you can assign an area of responsibility called <i>High Schools</i> . 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**).

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.

The screenshot shows the 'Leadership Types' page. At the top, the title 'Leadership Types' is displayed. Below the title, the 'Leadership Type' is set to 'COM'. The page is divided into two main sections: 'Leadership Type' and 'Volunteer Structure'. The 'Leadership Type' section includes fields for 'Effective Date' (01/01/1998), 'Status' (Active), and 'Description' (Alumni Committee). The 'Volunteer Structure' section includes a table with columns for 'Role', 'Nbr Needed', 'Term Length', and 'Sel Process'. The 'Required' checkbox is unchecked. The table contains one row with the following values: Role: Committee Membe, Nbr Needed: 10, Term Length: One Year, Sel Process: Appointed.

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**).

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.

**Volunteer Goals**

**Volunteer:** 10YRCOMM 10 Year Reunion Committee      **Institution:** PSUNV

**Financial Goal:** 400,000.00 USD    **% Particptn Goal:** 60.00

| Intermediate Goals/Milestones |                 |          |                      |                  |  |
|-------------------------------|-----------------|----------|----------------------|------------------|--|
| *Target Date                  | *Goal Type      | Pers/Org | Audience Code        | Amount/Pct/Total |  |
| 06/06/2006                    | % Participation | Pers     | <input type="text"/> | 55.00            |  |

| <i>Field or Control</i>   | <i>Description</i>   |
|---|--|
| <b>Financial Goal and % Particptn Goal</b> (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.                                       |
| <b>Target Date</b>  | Enter the date by which the goal may be reached.   |
| <b>Goal Type</b>  | Select the measurement by which you track the progress toward the goal.  |
| <b>Audience Code</b>  | 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 <i>Segmentation</i> 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**).

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.

### Volunteer Structure

**Initiative:** ANNFUND    **Intv Type:** CAMPAIGN    **Institution:** PSUNV  
**Initiative Name:** Annual Fund Campaign

Find | View All    First ◀ 1 of 1 ▶ Last

**Effective Date:** 01/24/2001 31    **Status:** Active + -

**Leadership Group:** annfund group

**Leadership Type:** Advisory Board + -

Build Default Structure

Find | View All    First ◀ 1 of 1 ▶ Last

| *Role   | Nbr Needed | Term Length                                     | Sel Process                                      | Required                 |  |
|---|------------|---|--|--------------------------|--|
| Vice-Chairperson <span style="float: right;">+ -</span> | 1          | One Year <span style="float: right;">+ -</span> | Appointed <span style="float: right;">+ -</span> | <input type="checkbox"/> |  |

| <i>Field or Control</i>        | <i>Description</i>   |
|--------------------------------|--|
| <b>Leadership Group</b>        | Enter the name of the leadership group or the highest level of volunteer leadership for the initiative or member organization (up to 50 characters).   |
| <b>Leadership Type</b>         | Select a volunteer structure defined on the Leadership Type page.  |
| <b>Build Default Structure</b> | Click to populate the <b>Volunteer Structure Detail</b> 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**).

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.

The screenshot shows the 'Sub-Groups' page with the following details:

- Initiative:** ANNFUND
- Intv Type:** CAMPAIGN
- Institution:** PSUNV
- Initiative Name:** Annual Fund Campaign
- Effective Date:** 06/06/2006
- Status:** Active
- Vol Sub-Group:** 2005-06 Ann Fund Subgroup
- Leadership Type:** Advisory Board
- Build Default Structure:** A yellow button.
- Sub-Group Structure Table:**

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

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

| <i>Field or Control</i>                   | <i>Description</i>   |
|---|--|
| <b>Vol Sub-Group</b> (volunteer subgroup) | Enter a name for the volunteer subgroup (up to 50 characters).   |
| <b>Leadership Type</b>                    | Select a volunteer structure defined on the Leadership Type page.  |
| <b>Build Default Structure</b>            | 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" (Campus Community Fundamentals)

## 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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|------------------|------------------------|--|--|
| Gift Types       | AV_GFT_TYPE_TBL        | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Session Management &gt; Gift Types</b> | 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**).

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.

### Gift Types

**Gift Type:** GIK

Find | View All    First 1 of 1 Last

**\*Effective Date:**

**\*Status:**

**\*Description:**

**Short Description:**

**\*CAE Type:**

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 |

| Field or Control                                    | Description   |
|---|---|
| <b>CAE Type</b> (Council for Aid to Education type) | <p>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.</p> <p><i>Gift In Kind</i> gift types that do not have a <i>Real Estate</i> tender type assigned to them are reported in Part IV of the CAE report (II, C2a, Number and dollar value of company products).</p> |

### 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.



| <b>Field or Control</b>   | <b>Description</b>  |
|---|---|
| <b>Item Type</b>  | Enter the item type to be used when processing a transaction with this tender to the financial system.  |
| <b>CAE Real Estate</b> (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

| <b>Page Name</b>  | <b>Definition Name</b> | <b>Navigation</b>   | <b>Usage</b>                                |
|-------------------|------------------------|---|---|
| Designation Types | AV_INST_TYP_TBL        | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Session Management &gt; Designation Types</b> | 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:

| <b><i>For Designations</i></b> | <b><i>For Gift Types</i></b>         |
|--------------------------------|--------------------------------------|
| 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

| <i>Page Name</i>    | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|---------------------|------------------------|---|---|
| Matching Gift Types | AV_MTCH_GFT_TBL        | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Session Management &gt; Matching Gift Types</b> | 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" (Campus Community Fundamentals)

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

| <i>Page Name</i>  | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|-------------------|------------------------|---|--|
| Designation Funds | AV_DESIGNATION         | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Session Management &gt; Designation Funds</b> | 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**).

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.

**Designation Funds**

SetID: MODEL      Designation: ALUMNILIFE

Find | View All      First 1 of 1 Last

\*Designation Name: Alumni Assn Lifetime Membershp      \*Effective Date: 01/01/1900

\*CASE Type: Endowment & Similar      \*Status: Active

\*CASE Purpose: Non-Gift      Campus:

\*FASB Type: Perm. Restricted      Acad Org:

\*Match Gift Type: None      Department:

\*Designation Type: ENDOW Endowment

\*Item Type: 00000100002 Byerton Alumni Assn Scholarshi

Institution: PSUNV

Responsible:

Formal Description: Alumni Assn Lifetime Membershp

Comment:

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.

Customize | Find | View All      First 1 of 1 Last

Attachments      Audit

**Attached File**      View      Add Attachment

View      Add Attachmen

**Acknowledgements**

Event ID      Role

Gift:     

Pledge:     

**Tribute Recipient**      Find | View All      First 1 of 1 Last      **Original Donor**      Find | View All      First 1 of 1 Last

ID      Name      ID Type      ID      Name

Person

| Field or Control | Description                                  |
|------------------|--|
| Designation Name | Enter the full name of the designation fund. |

| <b>Field or Control</b>   | <b>Description</b>  |
|---|---|
| <p><b>CASE Type</b> (Council for the Advancement and Support of Education type)</p>       | <p>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 <i>Current Restricted, Current Unrestricted, Endowment &amp; Similar, Loan Funds, Non-Gift, and Plant Funds</i>.</p> <p>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.</p> <hr/> <p><b>Note:</b> This field supports Part IA and Part II of the CAE report.</p>  |
| <p><b>CASE Purpose</b> (Council for the Advancement and Support of Education purpose)</p> | <p>Select the specific utilization category of the designation fund as defined by the CASE. Valid CASE purposes are <i>Academic Divisions, Athletics, Chairs, Equipment, Faculty/Staff Compensation, Financial Aid, Land &amp; Buildings, Library, Non-Gift, Other Restricted Purpose, Prizes, Public Service &amp; Ext., Special Programs, Student Projects, Research, and Unrestricted</i>.</p> <p>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.</p> <hr/> <p><b>Note:</b> This field supports Part II of the CAE report.</p> |
| <p><b>FASB Type</b> (Financial Accounting Standards Board type)</p>                       | <p>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.</p> <hr/> <p><b>Note:</b> This field supports Part I of the CAE report.</p>  |
| <p><b>Match Gft Type</b> (matching gift type)</p>   | <p>Select the category to determine if matching gift companies match gifts to this designation. The CASE Matching Gift Details book provides the following eligibility categories: <i>Athletic Activities Programs, Athletic Building Funds, Athletic Scholarships, Non Athletic Building Funds, and Non Athletic Scholarships</i>.</p> <hr/> <p><b>Note:</b> Define a matching gift type of <i>None</i> for those gifts that do not match any of the other matching gift types; this field is required and cannot be left blank. <i>None</i> indicates that matching gift companies put no restrictions on this designation.</p>   |

| <b>Field or Control</b>  | <b>Description</b>   |
|--|--|
| <b>Designation Type</b>  | <p>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 <i>Law School</i>, <i>Athletic Accounts</i>, and so on.</p> <hr/> <p><b>Note:</b> Include a designation type of <i>None</i> 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.</p> <hr/> |
| <b>Item Type</b>   | Enter the specific reference to the chart of accounts within PeopleSoft Student Financials.  |
| <b>Responsible</b>   | Enter the staff member responsible for managing this designation fund.   |
| <b>Formal Description</b>  | <p>Enter a long designation description, up to 254 characters. The value you enter here can be used when you generate acknowledgements.</p> <p>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.</p>   |
| <b>Campus, Acad Org</b> (academic organization), and <b>Department</b> | 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.

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Event ID</b>         | 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.   |
| <b>Role</b>             | 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 <i>Prospect Manager</i> , <i>Campaign Manager</i> , <i>Gift and Pledge Supervisor</i> , 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

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>ID and Name</b>      | <p>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.</p> <hr/> <p><b>Note:</b> 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.</p> <hr/> |

### Original Donor

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>ID Type</b>          | Select whether the original donor is a <i>Person</i> or an <i>Org</i> (organization).  |
| <b>ID and Name</b>      | 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

| <i>Page Name</i>  | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|-------------------|------------------------|---|---|
| Recognition Types | AV_RCG_TYPE_TBL        | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Session Management &gt; Recognition Types</b> | 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:

| <i>Code</i> | <i>Value</i> |
|-------------|--------------|
| 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

| <i>Page Name</i>   | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>  |
|--------------------|------------------------|--|---|
| Adjustment Reasons | AV_ADJ_REASON_TBL      | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Session Management &gt; Adjustment Reasons</b> | 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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>                           |
|------------------|------------------------|--|--|
| Initial Setup    | ITEM_TYPE_TBL          | <b>(Set Up SACR &gt;Product Related &gt;Student Financials &gt;Item Types &gt;Item Types &gt;Initial Setup</b> | 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:

| <b><i>Journal Set</i></b> | <b><i>Data Entry Type</i></b>  | <b><i>DB/CR Indicator</i></b>   |
|---------------------------|--------------------------------|---|
| 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/<br>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**)

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.

The screenshot shows the 'Initial Setup' page for an item type. The page has several tabs at the top: 'Initial Setup', 'Amount Edits', 'Miscellaneous', 'External Awards', 'Posting Restrictions', 'Account Types', and 'GL Interface'. The 'Initial Setup' tab is selected.

Fields and controls include:

- SetID:** PSUNV
- Item Type:** 000001000021
- Effective Date:** 01/01/1900
- Status:** Active
- Description:** Annual Fund
- Short Desc:** Annual Fun
- Keywords:** Three empty input fields with search icons.
- Classification:** A list of radio buttons for selecting a classification:
  - Application Fee
  - Billing
  - Charge
  - Contributor Relations (selected)
  - Deposit
  - Financial Aid
  - GL Interface Only
  - Interest
  - Payment
  - Pay Plan Credit
  - Pre-Paid Tuition
  - Transfers
  - Refund
  - Waiver
  - Withholding
  - Write-off
- Accounting Date Options:**
  - Accounting Date Control:** Run Date
  - Accounting Date ID:** Empty input field
- Checkboxes:**
  - Tuition Deposit
  - GL Interface Required
  - Course Class Specific

| <b>Field or Control</b>        | <b>Description</b>  |
|--------------------------------|---|
| <b>G/L Interface Required</b>  | Select this check box to indicate that both a credit and debit side of each transaction are required.   |
| <b>Accounting Date Control</b> | <p>If you select the <b>GL Interface Required</b> check box, this field becomes active. Specify the accounting date of the item type. Select from the following values:</p> <p><i>Run Date:</i> Select to use the current date as the accounting date.</p> <p><i>Item Effective Date:</i> Select to use the applicable gift date, pledge effective date, or membership start date as the accounting date.</p> <p>The <b>Accounting Date Control</b> value that you select affects the <b>Journal Line Date</b> field on the Accounting Line page (<b>Contributor Relations &gt; Session Management &gt; Supervise Sessions &gt; Accounting Line Summary</b>) as generated by the Contributor Relations GL Interface process.</p> <hr/> <p><b>Note:</b> 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.</p> <hr/> |
| <b>Classification</b>          | 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" (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:

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:

|                             |        |                            |        |                                  |
|-----------------------------|--------|----------------------------|--------|----------------------------------|
| <b>Tender Asset Account</b> |        | <b>Designation Account</b> |        | → Offsetting 100 US DB/100 US CR |
| Journal Set 0               |        | Journal Set 1              |        |                                  |
| Debit                       | Credit | Debit                      | Credit |                                  |
| 100.00                      |        |                            | 100.00 |                                  |

### Scenario 2

Donor makes a gift of 100 USD to two designations:

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:

|                             |        |                              |        |  |
|-----------------------------|--------|------------------------------|--------|--|
| <b>Tender Asset Account</b> |        | <b>Designation Account 1</b> |        | → Offsetting 100 USD DB/<br>2 -50 USD CR |
| Journal Set 0               |        | Journal Set 1                |        |  |
| Debit                       | Credit | Debit                        | Credit |  |
| 100.00                      |        |                              | 50.00  |  |
|                             |        | <b>Designation Account 2</b> |        |  |
|                             |        | Journal Set 1                |        |  |
|                             |        | Debit                        | Credit |  |
|                             |        |                              | 50.00  |  |

### 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):

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:

| Accounts Receivable |        | Designation Account |         |
|---------------------|--------|---------------------|---------|
| Journal Set 2       |        | Journal Set 2       |         |
| Debit               | Credit | Debit               | Credit  |
| 1000.00             |        |                     | 1000.00 |



Offsetting 1000 USD DB/  
1000 USD CR

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

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:

| Accounts Receivable |        | Tender Asset Account |        |
|---------------------|--------|----------------------|--------|
| Journal Set 3       |        | Journal Set 0        |        |
| Debit               | Credit | Debit                | Credit |
|                     | 500.00 | 500.00               |        |
|                     | 500.00 | 500.00               |        |



Offsetting 500 USD CR/  
500 USD DB

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

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:

| Accounts Receivable |        | Tender Asset Account |        |
|---------------------|--------|----------------------|--------|
| Journal Set 3       |        | Journal Set 0        |        |
| Debit               | Credit | Debit                | Credit |
|                     | 500.00 | 500.00               |        |

Offsetting 1000 USD DB/  
2- 500 CRs to zero out  
receivable

Offsetting 1000 USD CR/  
2- 500 USD DBs to offset  
designation's expected  
credit. Tender now equals  
designation credit and  
pledge payment reflects  
activity similar to a gift with  
a tender/designation  
journal set combination.

Offsetting 500 USD CR/  
500 USD DB

### Scenario 4

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

| Tender Asset Account |        | Designation Account |        | → Offsetting 100 USD DB/100 USD CR of original gift |
|----------------------|--------|---------------------|--------|---|
| Journal Set 0        |        | Journal Set 1       |        |   |
| Debit                | Credit | Debit               | Credit |   |
| 100.00               |        |                     | 100.00 |   |

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

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:

| Tender Asset Account |        | Designation Account |        | → Offsetting reversal offsets original gift to zero. |
|----------------------|--------|---------------------|--------|--|
| Journal Set 0        |        | Journal Set 1       |        |  |
| Debit                | Credit | Debit               | Credit |  |
|                      | 100.00 | 100.00              |        |  |

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

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:

| Tender Asset Account |        | Clearing Account |        | → Offsetting 90 USD DB to the tender account and 90 USD CR to the clearing account will be zeroed out with reversing entries when the refund is manually generated. |
|----------------------|--------|------------------|--------|---|
| Journal Set 0        |        | Journal Set 0    |        |   |
| Debit                | Credit | Debit            | Credit |   |
| 90.00                |        |                  | 90.00  |   |
| Tender Asset Account |        | Clearing Account |        |   |
| Journal Set 0        |        | Journal Set 0    |        |   |
| Debit                | Credit | Debit            | Credit |   |
| 90.00                |        |                  | 90.00  |   |

The new corrected gift is created:

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:

| Tender Asset Account |        | Designation Account |        | → Offsetting 10 USD DB /10 USD CR of correct gift |
|----------------------|--------|---------------------|--------|---|
| Journal Set 0        |        | Journal Set 1       |        |   |
| Debit                | Credit | Debit               | Credit |   |
| 10.00                |        |                     | 10.00  |   |

**Related Links**

"Creating Accounting Entries Using the GL Interface Process" (Student Financials)

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## 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.

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## Defining Acknowledgement Rules

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**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" (Campus Community Fundamentals)

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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

| <i>Field or Control</i>  | <i>Description</i>  |
|--------------------------|---|
| <b>No Receipt</b>        | <p>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:</p> <ul style="list-style-type: none"> <li>When you want the donor to receive another acknowledgement letter, in lieu of a receipt.<br/><br/>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.</li> <li>When you want the donor to receive an acknowledgement receipt only (no overall acknowledgement letter).<br/><br/>In this instance, you would select the check box and select the event ID for your default receipt.</li> </ul> <p><b>Note:</b> The system clears the <b>No Receipt</b> check box by default, acknowledging all gifts with a receipt (unless you specify otherwise).</p> |
| <b>Event ID and Role</b> | <p>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.</p> <p>You can either enter an event ID or select a role. Selecting a value for one field clears the other field.</p>   |

## Pages Used to Define Acknowledgement Rules

| <i>Page Name</i>       | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|------------------------|------------------------|--|--|
| Acknowledgement Setup1 | AV_ACKNLDG_SETUP       | <b>Set Up SACR</b> ><br><b>Product Related</b> ><br><b>Contributor Relations</b> ><br><b>Session Management</b> ><br><b>Acknowledgement Setup</b> ><br><b>Acknowledgement Setup1</b> | Set up acknowledgement rules based on service indicators and gift amounts. |

| Page Name              | Definition Name   | Navigation   | Usage   |
|------------------------|-------------------|--|---|
| Acknowledgement Setup2 | AV_ACKNLDG_SETUP2 | Set Up SACR ><br>Product Related ><br>Contributor Relations ><br>Session Management ><br>Acknowledgement Setup ><br>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 ><br>Product Related ><br>Contributor Relations ><br>Session Management ><br>Acknowledgement Setup ><br>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**).

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 screenshot shows the 'Acknowledgement Setup1' page for 'PSUNV PeopleSoft University'. It features two main sections: 'Service Indicator' and 'Gift Amount'. Both sections include a table with columns for Service Indicator, \*Type, Priority, Receipt, Event ID, and Role. The 'Service Indicator' section has 3 rows, and the 'Gift Amount' section has 3 rows. Each row includes a search icon and expand/collapse buttons (+/-).

| Service Indicator |        |          |                                     |          |                    |
|-------------------|--------|----------|-------------------------------------|----------|--------------------|
| Service Indicator | *Type  | Priority | Receipt                             | Event ID | Role               |
| Planned Giving    | Gift   | 3        | <input type="checkbox"/>            |          |                    |
| President         | Gift   | 1        | <input type="checkbox"/>            |          | President's Office |
| Planned Giving    | Pledge | 4        | <input checked="" type="checkbox"/> |          |                    |

| Gift Amount |           |            |                                     |          |      |
|-------------|-----------|------------|-------------------------------------|----------|------|
| From Amount | To Amount | *Type      | Receipt                             | Event ID | Role |
| 100.00      | 999.99    | USD Gift   | <input type="checkbox"/>            |          |      |
| 100.00      | 999.99    | USD Pledge | <input checked="" type="checkbox"/> |          |      |
| 1,000.00    | 9,999.99  | USD Gift   | <input type="checkbox"/>            |          |      |

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

## Service Indicator

| <i>Field or Control</i>           | <i>Description</i>   |
|-----------------------------------|--|
| <b>Service Indicator and Type</b> | Select a service indicator and an acknowledgement type. For example, you can select <i>Major Donor</i> and <i>Gift</i> from the fields to set up rules for acknowledging major donors' gifts.  |
| <b>Priority</b>                   | 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 <i>President</i> as priority 1 and <i>Planned Giving</i> 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 <i>President</i> is the one the donor receives. |

## Gift Amount

| <i>Field or Control</i>                 | <i>Description</i>   |
|---|--|
| <b>From Amount, To Amount, and Type</b> | 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**).

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.

The screenshot shows the Acknowledgement Setup2 page with the following sections:

- Navigation:** Acknowledgement Setup1 | **Acknowledgement Setup2** | Acknowledgement Setup3
- Institution:** PSUNV PeopleSoft University
- Adjustments:**
  - No Receipt:**
  - Event ID:** [Text Field] [Search Icon]
  - Gift:** [Text Field]
  - Pledge:** [Text Field] [Search Icon]
  - Role:** Acknowledgement Coordina [Dropdown]
- In Honor:**
  - No Receipt:**
  - Event ID:** [Text Field] [Search Icon]
  - Gift:** [Text Field]
  - Pledge:** [Text Field] [Search Icon]
  - Role:** [Dropdown]
- In Memory:**
  - No Receipt:**
  - Event ID:** [Text Field] [Search Icon]
  - Gift:** [Text Field]
  - Pledge:** [Text Field] [Search Icon]
  - Role:** [Dropdown]

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**).

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.

The screenshot shows the Acknowledgement Setup3 page with the following sections:

- Navigation:** Acknowledgement Setup1 | Acknowledgement Setup2 | **Acknowledgement Setup3**
- Institution:** PSUNV PeopleSoft University
- Deceased:**
  - Event ID:** [Text Field] [Search Icon]
  - Role:** Acknowledgement Coordinator [Dropdown]
- Anonymous:**
  - Role:** Acknowledgement Coordinator [Dropdown]

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

| <i>Page Name</i>    | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|---------------------|------------------------|--|--|
| Matching Gift Rules | AV_MTCH_ORG_RULES      | <ul style="list-style-type: none"> <li>Contributor Relations, Session Management, Matching Gifts, Add/Update Matching Rules, Matching Gift Rules</li> <li>Contributor Relations, Session Management, Matching Gifts, Matching Rules - Workset</li> </ul> | 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**).

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.

### Matching Gift Rules

Organization Testing Corp      ID: AV5555              

**Minimum Match Amount:**       **Currency Code:**        **Last Modification Date:** 09/10/2006

**MG Designation Type:**  

**Receipts:**  

**Distribution Schedule:**  

**Distribution Date:**

**Deadline Date:**

**Annual Matching Gift Budget**

**Overall Total:**

**Donor/Institution Total:**

**Institution Total:**

**Donor Total:**

Payroll Eligibility       Duplicate Match

| Match Detail |          |                      |                      |   |   |
|--------------|----------|----------------------|----------------------|---|---|
| Ratio        | To Ratio | Minimum Match Amount | Maximum Match Amount |   |   |
| 1.00         | 2.00     | 0.00                 | 1,000.00             |  |  |
| 1.00         | 1.00     | 1,000.01             | 2,500.00             |  |  |

**Restrictions**

| Ineligible Designation Types |  | Eligible Alumni Status   |  |
|------------------------------|--|--------------------------|--|
| <b>Matching Gift Type</b>    | <input type="text" value="Athletic Building Funds"/>   | <b>Alumni Status</b>     | <input type="text" value="Alumnus"/>           |
| Ineligible Gift Types        |  | Eligible Employee Status |  |
| <b>Gift Type</b>             | <input type="text" value="Alumni Dues"/>             | <b>Employee Status</b>   | <input type="text" value="All Employees"/>   |

| Required Information              |   |   |
|-----------------------------------|---|---|
| Required Information              |   |   |
| <input type="text" value="Form"/> |  |  |

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.

| Attachments   |      |                |   |
|---------------|------|----------------|---|
| Attached File | View | Add Attachment |   |
|               | View | Add Attachment |  |

**Matching Gift Contacts**      Find | View All      First  1 of 1  Last

**Contact Name:** Wale, Tanya      

**Job Title:** Director of Matching Gifts

| Contact Phones |        |              |           |                                     |
|----------------|--------|--------------|-----------|-------------------------------------|
| Phone Type     | Prefix | Phone        | Extension | Preferred                           |
| Business       |        | 480/555-8909 |           | <input checked="" type="checkbox"/> |

**Comment:**

| <b>Field or Control</b>     | <b>Description</b>  |
|-----------------------------|---|
| <b>Minimum Match Amount</b> | 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. |
| <b>Currency Code</b>        | <b>Note:</b> 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:

| <b>Field or Control</b>                                     | <b>Description</b>   |
|---|--|
| <b>MG Designation Type</b> (matching gift designation type) | Indicate the designation to which matching gift funds must be applied when they are received. Values for this field include <i>Any Eligible</i> , <i>Donor's Designation</i> , and <i>Gen'l Operating Budget</i> . This field information only field enables you to determine to what designations a matching gift company's payment should be allocated.<br><br>Values for this field are delivered with the system as translate values. You can modify these translate values. |
| <b>Receipts</b>   | Select the appropriate option for receipts. <i>Periodically</i> means receipts may be combined and sent to the organization periodically. <i>Each Gift</i> means the organization requires a receipt from the institution for each company gift. This field is not included in automated acknowledgement process.<br><br>Values for this field are delivered with the system as translate values. You can modify these translate values.   |
| <b>Distribution Schedule</b>                                | Determine the frequency with which organizations make matching gift payments to your institution. Values include: <i>Annually</i> , <i>Continuously</i> , <i>Monthly</i> , <i>Quarterly</i> , and <i>Semiannually</i> .<br><br>Values for this field are delivered with the system as translate values. You can modify these translate values.   |
| <b>Distribution Date</b>                                    | Enter a value if the organization only matches gifts once a year on a specific date. Enter the date as mm/dd.  |
| <b>Deadline Date</b>  | 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.  |

| <b>Field or Control</b>     | <b>Description</b>   |
|-----------------------------|--|
| <b>Payroll Eligibility</b>  | Select if the organization offers employees the option of having payroll deduction gifts matched through its matching gift program.  |
| <b>Duplicate Match</b>      | 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.   |
| <b>Required Information</b> | Select the items an organization must receive prior to matching a gift. Examples are <i>Matching Gift Form</i> , <i>Original Check to Company</i> , <i>Donor Calls Company</i> , and <i>Receipt</i> .<br><br>Values for this field are delivered with the system as translate values. You can modify these translate values. |
| <b>Comment</b>              | 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

| <b>Field or Control</b>        | <b>Description</b>  |
|--------------------------------|---|
| <b>Overall Total</b>           | Enter the organization's total annual matching gift budget.<br>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. |
| <b>Donor/Institution Total</b> | Enter the maximum monetary amount the organization will match toward one donor's gifts to your institution this year.   |
| <b>Institution Total</b>       | Enter the maximum monetary amount the organization will give to your institution in matching gift payments this year.   |
| <b>Donor Total</b>             | 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.

| <b>Field or Control</b>                              | <b>Description</b>   |
|--|--|
| <b>Ratio and To Ratio</b>                            | <p>Enter the formula by which an organization calculates the amount it matches for each regular donor gift to your institution. Ratio ranges can include fractions such as 1.25:1. This field is used in the automatic calculation of the expected matching gift amount.</p> <p>You can enter multiple match ratios as long as the amount ranges associated with each ratio do not overlap.</p>  |
| <b>Minimum Match Amount and Maximum Match Amount</b> | <p>For each ratio, enter a minimum amount and maximum amount. These fields are used in the automatic calculation of the expected matching gift amount.</p> <p>For example, if the matching gift organization matches 100 percent of gifts from 25 to 25,000 USD, then the first minimum amount field on this page should be set to 25 USD and the first <b>Ratio Minimum Amount</b> 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.</p> <p>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.</p> |

## Restrictions

| <b>Field or Control</b>             | <b>Description</b>  |
|-------------------------------------|---|
| <b>Ineligible Designation Types</b> | 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.         |
| <b>Ineligible Gift Types</b>        | 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. |

| <b>Field or Control</b>         | <b>Description</b>   |
|---------------------------------|--|
| <b>Eligible Alumni Status</b>   | <p>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 <i>Alumnus, Attendance Requirement, Child or Spouse Attended, and Graduate.</i></p> <p>Values for this field are delivered with the system as translate values. You can modify these translate values.</p>   |
| <b>Eligible Employee Status</b> | <p>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 <i>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.</i></p> <p>Values for this field are delivered with the system as translate values. You can modify these translate values.</p> |

### 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.

| <b>Field or Control</b>    | <b>Description</b>   |
|----------------------------|--|
| <b>Contacts</b>            | Click this button to access the page where contact information can be updated. |
| <b>Contact Information</b> | 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

| <i>Page Name</i>   | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|--------------------|------------------------|--|--|
| Giving Club Rules  | AV_GCLUB_TBL           | <b>Contributor Relations &gt; Session Management &gt; Giving Clubs &gt; Giving Club Management &gt; Giving Club Rules</b>  | Define the giving clubs at your institution.                               |
| Giving Club Levels | AV_GCLUB_LVL           | <b>Contributor Relations &gt; Session Management &gt; Giving Clubs &gt; Giving Club Management &gt; Giving Club Levels</b> | 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**).

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.

Giving Club Rules
Giving Club Levels

**Giving Club:** ANNUAL

**Name:**

**Description:**

**Administrator:**  Boudreaux,Lisele

**Campaign:**

**Institution:** PSUNY

**Start Date:**  31

**End Date:**

**Status:**

**Club Rules**

**Reset Membership at Fiscal Yr**

**Notify Staff Assigned to Donor**

**Special Acknowledgement**

---

**Include in Calculations**

**Hard Credits**     **Soft Credits**

**Matching Gifts**     **Spouse Giving**

**Eligible Designations**

All   
  Type   
  Specific

Customize | Find | View All | First 1-3 of 4 Last

| *Business Unit | *Designation |                      |     |
|----------------|--------------|----------------------|-----|
| LAWBU          | LAWSCHOOL    | <input type="text"/> | + - |
| LAWBU          | LIBRARYEND   | <input type="text"/> | + - |
| MEDBU          | ANNUALFUND   | <input type="text"/> | + - |

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Name</b>             | Name the giving club (up to 30 characters).  |
| <b>Administrator</b>    | 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.  |
| <b>Campaign</b>         | 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

| <i>Field or Control</i>  | <i>Description</i>  |
|--|---|
| <b>Reset Membership at Fiscal Yr</b> (reset membership at fiscal year) | Select to make the system recalculate and regenerate membership at the beginning of each new fiscal year. |

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| <b><i>Field or Control</i></b>        | <b><i>Description</i></b>  |
|---------------------------------------|--|
| <b>Notify Staff Assigned to Donor</b> | 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. |
| <b>Special Acknowledgement</b>        | 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**

| <b><i>Field or Control</i></b> | <b><i>Description</i></b>   |
|--------------------------------|---|
| <b>Hard Credits</b>            | Select to include hard credit when calculating a donor's eligibility for this giving club.    |
| <b>Soft Credits</b>            | Select to include soft credit when calculating a donor's eligibility for this giving club.    |
| <b>Matching Gifts</b>          | Select to include matching gifts when calculating a donor's eligibility for this giving club. |
| <b>Spouse Giving</b>           | Select to include spouse giving when calculating a donor's eligibility for this giving club.  |

### **Eligible Designations**

| <b><i>Field or Control</i></b> | <b><i>Description</i></b>   |
|--------------------------------|---|
| <b>All</b>                     | Select to include all designations in giving club calculations.   |
| <b>Type</b>                    | Select to include particular designations such as Law School, Scholarships, and so on. These values are defined on the Designation Type page. |
| <b>Specific</b>                | Select to include specific designations in giving club calculations.  |

## Remaining Fields

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Business Unit</b>    | If you select <i>Type</i> or <i>Specific</i> , 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. |
| <b>Type Code</b>        | If you select <i>Type</i> , 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.                       |
| <b>Designation</b>      | If you select <i>Specific</i> , 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**).

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.

The screenshot displays the 'Giving Club Levels' configuration page. At the top, there are two tabs: 'Giving Club Rules' and 'Giving Club Levels'. Below the tabs, the following information is shown:

- Giving Club:** ANNUAL
- Institution:** PSUNV
- Name:** Annual Giving Club

Below this information is a table with one row:

| Level: | Members: | Minimum:     | Maximum: |
|--------|----------|--------------|----------|
| SILVER | 0        | 1,000.00 USD | 0.00     |

Underneath the table is a section for 'Benefit' with a text input field containing 'Aerial campus photo'. The page also features navigation elements like 'Find | View All', 'First', '1 of 1', and 'Last' buttons.

| <b>Field or Control</b>    | <b>Description</b>   |
|----------------------------|--|
| <b>Level</b>               | Name the giving club (up to 10 characters). Level names are usually very specific for each institution, but an example might include a giving club with levels of <i>Bronze</i> , <i>Silver</i> , <i>Gold</i> , and <i>Platinum</i> .  |
| <b>Members</b>             | Displays the number of members in the club at this level.  |
| <b>Minimum and Maximum</b> | 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.                                      |
| <b>Benefits</b>            | 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

| <i>Page Name</i>                                       | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|--|------------------------|---|--|
| Credit Card Type                                       | AV_CR_CARD_TYPE        | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Session Management &gt; Credit Card Type</b>            | Define which credit cards are acceptable for credit card processing for each setID.  |
| CR Merchants (Contributor Relations merchants)         | AV_MERCHANT_TBL        | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Session Management &gt; Merchant Table</b>              | 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        | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; Install Contributor Relations &gt; Business Unit CR</b> | Associate a merchant table with a business unit. There is a 1:1 relationship between a <b>Merchant ID</b> and <b>Business Unit</b> .   |

## 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**).

| <i>Field or Control</i>           | <i>Description</i>  |
|-----------------------------------|---|
| <b>Credit Card Name</b>           | 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.   |
| <b>Credit Card Number Length</b>  | <p>Enter the number of digits for this credit card number. Users must enter a credit card account number for this credit card that is equal in length to the value you specify. Separate valid card length values with a comma.</p> <p>Common number length values are as follows:</p> <ul style="list-style-type: none"> <li>• Visa: 13 or 16</li> <li>• MasterCard: 16</li> <li>• American Express: 15</li> <li>• Discover/Novus: 16</li> </ul> |
| <b>Credit Card Status</b>         | Select <i>Active</i> to make this credit card available for selection on credit card entry pages. Select <i>Inactive</i> to make this credit card unavailable for selection on credit card entry pages.   |
| <b>Credit Card Valid Prefixes</b> | <p>Enter all valid prefix numbers for this credit card. Separate valid prefixes with a comma.</p> <p>Common prefix values are as follows:</p> <ul style="list-style-type: none"> <li>• Visa: 4</li> <li>• MasterCard: 51, 52, 53, 54, or 55</li> <li>• American Express: 37 or 34</li> <li>• Discover/Novus: 6011</li> </ul>  |
| <b>Use Check Digit Algorithm</b>  | Select <i>Y</i> (yes) to have the system check the validity of the credit card numbers during the credit card entry process. Select <i>N</i> (no) to not have the system check credit card numbers for validity.  |

## Defining Connection Parameters for a Third-Party Processor

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

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.

### CR Merchants

**Merchant ID:** CR\_MERCHANT

**\*Description:** Contributor Relations Merchant

**\*Payment Merchant:** CyberSource Int Broker 1 ▼

**Security Code Supported**

---

**Credit Card**

**Security Code - Self Service**       **Security Code - Batch**

**Credit Card Tracing:** Production ▼

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**Default Options**

**\*Type of Name:** Primary ▼      **\*Phone Type:** Home ▼

**\*Address Type:** Home ▼      **\*Email Type:** Home ▼

**\*Email Address:** ps@ps.com

| <i>Field or Control</i>        | <i>Description</i>  |
|--------------------------------|---|
| <b>Payment Merchant</b>        | <p>Select a third-party payment merchant to be used for processing credit card transactions. There are no delivered values for this field.</p> <p>Consult the <i>Electronic Payment Integration Developer's Reference Guide</i> 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.</p> <p>Payment merchants are defined on the Payment Merchant page (<b>Set Up SACR &gt; Common Definitions &gt; Electronic Payments &gt; Payment Merchant</b>).</p> |
| <b>Security Code Supported</b> | <p>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 <b>Security Code</b> entry field and the <b>What is a security code?</b> link on the self-service and session entry pages. When this check box is selected, the <b>Security Code - Self Service</b> and <b>Security Code - Batch</b> check boxes appear on this page.</p>   |

## Credit Card

| <b>Field or Control</b>             | <b>Description</b>  |
|-------------------------------------|---|
| <b>Security Code - Self Service</b> | Select this check box to enable the display of the <b>Security Code</b> field and associated message in the self-service Involvement payment pages.   |
| <b>Security Code - Batch</b>        | Select this check box to enable the display of the <b>Security Code</b> field and associated message in the Tender Type Detail pages for gift and membership entry.   |
| <b>Credit Card Tracing</b>          | <p>Select a control for the output files the system produces during each transaction. Your choices are:</p> <ul style="list-style-type: none"> <li>• <i>Connect with Trace</i>: Connect with service provider and produce a trace file in C:\temp directory.</li> <li>• <i>No Connect with Trace</i>: Do not connect with service provider, but produce a trace file in C:\temp directory.</li> <li>• <i>Production</i>: No tracing of any kind.</li> <li>• <i>Vendor Trace</i>: Connect with service provider and turn on service provider tracing.</li> </ul> |

## Default Options

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Type of Name</b>     | Select the type of name ( <i>Primary, Preferred, Legal, and so on</i> ) 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.              |
| <b>Phone Type</b>       | Select the type of phone ( <i>Business, Home, and so on</i> ) 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.                |
| <b>Address Type</b>     | Select the type of address ( <i>Primary, Preferred, Business, and so on</i> ) 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. |

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Email Type</b>       | Select the type of email address ( <i>Home, Business, and so on</i> ) 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. |
| <b>Email Address</b>    | 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" (Campus Community Fundamentals)

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

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## 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

| <i>Page Name</i>                                 | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|--|------------------------|---|---|
| Involvement Setup                                | AV_INST_WEB_INV        | <b>Set Up SACR &gt; Common Definitions &gt; Self Service &gt; Involvement &gt; Involvement &gt; Involvement Setup</b>                                 | Set institution-specific settings for online gift and pledge sessions.  |
| Web Designations                                 | AV_INST_WEB_DES        | <b>Set Up SACR &gt; Common Definitions &gt; Self Service &gt; Involvement &gt; Involvement &gt; Web Designations</b>                                  | Set up the web designations available to self-service donors during online gift and pledge sessions.  |
| Web Appeals                                      | AV_INST_WEB_MTVTN      | <b>Set Up SACR &gt; Common Definitions &gt; Self Service &gt; Involvement &gt; Involvement &gt; Web Appeals</b>                                       | Set up the web appeals available to self-service donors during online gift and pledge sessions.   |
| Web Campaigns                                    | AV_INST_WEB_CMP        | <b>Set Up SACR &gt; Common Definitions &gt; Self Service &gt; Involvement &gt; Involvement &gt; Web Campaigns</b>                                     | 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 <b>Narrative</b> 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 <b>Link Desig</b> 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 <b>Link Appeal</b> 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      | <b>Set Up SACR &gt; Product Related &gt; Contributor Relations &gt; CR Product-Related &gt; Gift and Pledge &gt; Involvement &gt; Giving Vehicles</b> | 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**).

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.

| Involvement Setup                               |   | Web Designations  | Web Appeals   | Web Campaigns                |
|---|---|---|---|------------------------------|
| <b>Institution:</b> PSUNV PeopleSoft University |   |   |   |                              |
| Find   View All    First ◀ 1 of 1 ▶ Last        |   |   |   |                              |
| <b>*Effective Date:</b>                         | 01/01/2001  | <b>*Status:</b>   | Active  |                              |
| <b>*Constituent Type:</b>                       | Friend  |   |   |                              |
| <b>*Payable to name:</b>                        | Peoplesoft Foundation c/o John Jacob                      |   |   |                              |
|   | <input checked="" type="checkbox"/> <b>Online Gifts</b>   | <input checked="" type="checkbox"/> <b>Linked Gifts</b> | <input checked="" type="checkbox"/> <b>Online Pledges</b> |                              |
|   | <b>*Default Payment Schedule:</b>                         |   | Monthly   |                              |
| Mail in address information                     |   |   |   |                              |
| <b>Country:</b>                                 | USA  United States  |   |   |                              |
| <b>Address:</b>                                 | 300 Northeastern<br>Attn: John Jacob<br>Phoenix, AZ 85250 |   |   | <a href="#">Edit Address</a> |

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.

| Additional information contact |                              |
|--------------------------------|------------------------------|
| <b>User ID:</b>                | PS                           |
| <b>Email ID:</b>               | ps@ps.com                    |
| <b>*Telephone:</b>             | 602/282-3035                 |
| Session Defaults               |                              |
| <b>*User ID:</b>               | PS                           |
| <b>*Business Unit:</b>         | MEDBU  Medical Business Unit |
| <b>*Session Count:</b>         | 10                           |
| <b>*Tender Type:</b>           | Credit Card                  |

| <b>Field or Control</b>                    | <b>Description</b>  |
|--|---|
| <b>Constituent Type</b>                    | 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 <i>Friend, Alumni, Faculty, Parent, Staff</i> , and so on. These values are defined by the organization on the Constituent Type page.<br><br>See <a href="#">Maintaining Constituent Types</a> .   |
| <b>Payable to name</b>                     | 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:<br><br><i>Online Gifts:</i> If selected, the system displays the <b>Make your gift securely online</b> link. This link takes donors directly to the Make a Donation - Welcome page to start the online giving process.<br><br><i>Linked Gifts:</i> If selected, the system displays the <b>Invest in existing campaigns</b> 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.<br><br><i>Online Pledges:</i> If selected, the system displays the <b>Make a pledge online</b> 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 <i>Semi-Annual, Annual, Bi-Monthly, Monthly, Quarterly, and Weekly</i> .  |

## Mail in address information

The address information you define here appears on the Donations - Ways to Give page and on the Mail In Donation Form. Mail in address information is used by online visitors who prefer to make a gift or pledge through the mail.

## Additional information contact

You must enter either a staff ID or an email ID in this section.

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>User ID</b>          | 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. |
| <b>Email ID</b>         | 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

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>User ID</b>          | 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. |
| <b>Business Unit</b>    | Select the default business unit that the system assigns to the online gift or pledge session.<br><br>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.<br><br>See <a href="#">Setting Up Credit Card Processing</a> .    |
| <b>Session Count</b>    | 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.   |
| <b>Tender Type</b>      | Select the tender type assigned to the self-service gift for online giving. Only tender types with a Special Fields value of <i>Credit Card</i> appear in the list.<br><br><b>Note:</b> This field does not apply to pledges.<br><br>See <a href="#">Defining Tender Types</a> .   |

## Defining Web Designations

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

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.

**Involvement Setup** | **Web Designations** | Web Appeals | Web Campaigns

**Institution:** PSUNV PeopleSoft University

Find | View All First 1 of 1 Last

**Effective Date:** 01/01/2001

**Available Designations** Find | View All First 1 of 2 Last

\*Sequence: 10 \*Designation Business Unit: MEDBU \*Designation: LAW SCHOOL + -

\*Description: Law School Dean's Fund

Gifts  Pledges

**Default Gift Designation**

| Sequence | Des BU | Designation | Description                    |
|----------|--------|-------------|--------------------------------|
| 10       | MEDBU  | ALUMNIANL   | Alumni Assn Annual Memberships |

**Default Pledge Designation**

| Sequence | Des BU | Designation | Description |
|----------|--------|-------------|-------------|
| 20       | PSUNV  | ANNUALFUND  | Annual Fund |

### Available Designations

| <i>Field or Control</i>          | <i>Description</i>   |
|----------------------------------|--|
| <b>Sequence</b>                  | Enter a numeric identifier for all unique combinations of designation business unit and designation.   |
| <b>Designation Business Unit</b> | Enter the operational unit to which the gift or pledge is designated.  |
| <b>Designation</b>               | Enter the designation or fund for distribution.  |
| <b>Description</b>               | 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. |

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| 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**).

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

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Appeal Code</b>      | 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.  |
| <b>Description</b>      | 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. |
| <b>Gifts</b>            | Select to make the appeal available for self-service gifts. These selections become available when donors select which appeal they are responding to.  |
| <b>Pledges</b>          | 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**).

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.

The screenshot shows the 'Web Campaigns' page for 'PSUNV PeopleSoft University'. At the top, there are navigation tabs: 'Involvement Setup', 'Web Designations', 'Web Appeals', and 'Web Campaigns'. Below the tabs, the institution name is displayed. A navigation bar includes 'Find | View All', 'First', '1 of 1', and 'Last'. The 'Effective Date' is set to '01/01/2001'. A section titled 'Available Campaigns' includes another 'Find | View All', 'First', '1 of 2', and 'Last' navigation. Below this, there are search boxes for '\*Initiative Code:' (containing 'ANNFUND') and '\*Description:' (containing 'Annual Fund Campaign'). There are checkboxes for 'Gifts' and 'Pledges', both of which are checked. There are also links for 'Link Desig' and 'Link Appeal', and '+' and '-' buttons. Below the search boxes, there are two sections: 'Default Gift Campaign' and 'Default Pledge Campaign'. Each section has a table with columns for 'Campaign' and 'Description'. In the 'Default Gift Campaign' section, the 'Campaign' field contains 'ANNFUND' and the 'Description' field contains 'Annual Fund Campaign'. The 'Default Pledge Campaign' section has empty fields for both 'Campaign' and 'Description'.

## Available Campaigns

| <i>Field or Control</i>               | <i>Description</i>   |
|---------------------------------------|--|
| <b>Initiative Code</b>                | 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.   |
| <b>Description</b>                    | 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. |
| <b>Gifts</b>                          | Select to make the campaign available for self-service gifts. Additionally, the campaign appears on the Donations - Campaigns page with a <b>Give to this campaign</b> link next to it.  |
| <b>Pledges</b>                        | Select to make the campaign available for self-service pledges. Additionally, the campaign will appear on the Donations - Campaigns page with a <b>Pledge to this campaign</b> link next to it.  |
| <b>Link Desig</b> (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.  |
| <b>Link Appeal</b>                    | 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.   |
| <b>Narrative</b>                      | 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).

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| 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.

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Sequence</b>         | Select a designation sequence number; this designation is linked to the selected campaign. The <b>Designation Business Unit, Designation, and Description</b> fields appear to the right.  |
| <b>Gifts</b>            | Select to link a designation to the campaign for self-service gifts. The Gifts column appears here only if the <b>Gifts</b> check box is selected on the Web Campaigns page. Also, if the <b>Gifts</b> check box is cleared on the Web Designations page for a particular designation, then the check box appears here but is unavailable for input.         |
| <b>Pledges</b>          | Select to link a designation to the campaign for self-service pledges. The Pledges column appears here only if the <b>Pledges</b> check box is selected on the Web Campaigns page. Also, if the <b>Pledges</b> check box is cleared on the Web Designations page for a particular designation, then the check box appears here but is unavailable for input. |

| <b>Field or Control</b>                | <b>Description</b>  |
|--|---|
| <b>Gift Default and Pledge Default</b> | 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. |
| <b>Copy All Web Designations</b>       | 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.

| <b>Field or Control</b>                | <b>Description</b>   |
|--|--|
| <b>Appeal Code</b>                     | Select an appeal code; this appeal code is linked to the selected campaign. Its <b>Description</b> field appears to the right.   |
| <b>Gifts</b>                           | Select to link an appeal to the campaign for self-service gifts. The Gifts column appears here only if the <b>Gifts</b> 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.         |
| <b>Pledges</b>                         | 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 <b>Pledges</b> check box is cleared on the Web Appeals page for a particular appeal, the check box appears here but is unavailable for input. |
| <b>Gift Default and Pledge Default</b> | 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.  |
| <b>Copy All Web Appeals</b>            | 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**).

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.

**Giving Vehicles**

**Institution:** PSUNV      **Giving Code:** 0006

**Giving Vehicle Detail**      Find | View All      First 1 of 1 Last

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

\*Description: Gift of Securities

\*Description: Gifts of appreciated securities may be deducted at full-market value on the date of transfer to the College. (Securities which you have held for one year or more are deductible up to 30% of your adjusted gross income. The deduction is limited to \$10,000 per year for individuals and \$20,000 per year for couples filing jointly.)

**Additional information contact**

User ID: PS

Email ID: ps@ps.com

Telephone:

These methods appear under the Other Ways to Give heading on the Ways to Give page.

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Giving Code</b>      | Displays the unique identifying code entered when the vehicle was created on the Add a New Value page.                             |
| <b>Description</b>      | Enter a short description of the giving vehicle (up to 30 characters), which appears as a subtitle on the Ways to Give page.       |
| <b>Description</b>      | 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**

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>User ID</b>          | Select the ID of the defined staff member listed as a contact name for inquiries about this giving vehicle.  |
| <b>Email ID</b>         | Enter the email address to be used for inquiries about this giving vehicle. The system populates this field. |

## Chapter 8

# Managing Constituent Data

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## 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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|------------------|------------------------|---|---|
| Search Criteria  | HCR_SM_SEARCH          | <b>Contributor Relations</b> ><br><b>Constituent Information</b> ><br><b>People</b> > <b>Search/Match</b> | Specify sets of criteria and arrange them in order for searching for duplicate or multiple records. |
| Search Results   | HCR_SM_RESULTS         | Click the <b>Search</b> 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:

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.

### Search Criteria

**Search Type:** Person  **Ad Hoc Search**

**Search Parameter:** PSCS\_CR SEARCH CR Person Search

**Search Result Rule**

**Search Result Code:** PSCS\_CR STNDRI CR Standard Results

[User Default](#)

Search
Clear All
Carry ID Reset

| Search Fields     | Operand     | Value                |
|-------------------|-------------|----------------------|
| National Id       | Begins With | <input type="text"/> |
| First Name Search | Begins With | <input type="text"/> |
| Last Name Search  | Begins With | <input type="text"/> |
| City              | Begins With | <input type="text"/> |

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.

|                  |             |                                 |
|------------------|-------------|---------------------------------|
| State            | Begins With | <input type="text" value="MS"/> |
| Country          | Begins With | <input type="text"/>            |
| Ethnic Group     | Begins With | <input type="text"/>            |
| Gender           | Begins With | <input type="text"/>            |
| Date of Death    | Equals      | <input type="text"/>            |
| Date of Birth    | Equals      | <input type="text"/>            |
| Constituent Type | Equals      | <input type="text" value="1"/>  |
| Class Year       | Equals      | <input type="text"/>            |

Here are the results of the search in this example:

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.

### Search Results

**Search Type:** Person  **Ad Hoc Search**

**Search Parameter:** PSCS\_CR SEARCH CR Person Search

**Result Code:** PSCS\_CR STNDRD CR Standard Results

**Search Results Summary** [Return to Search Criteria](#)

**Number of ID's Found:** 3

**Search Order Number:** 10 CR Person Search

| Search Results <span style="float: right;">Customize   Find   View All   First 1-3 of 3 Last</span> |   |                        |           |             |             |                  |            |
|---|---|------------------------|-----------|-------------|-------------|------------------|------------|
| Results   | Results2  | Additional Information |           |             |             |                  |            |
|   |   | EmpID                  | Last Name | First Name  | Middle Name | Constituent Type | Class Year |
| 1   | <a href="#">Carry ID</a> <a href="#">Detail</a> | AV0007                 | Whitney   | Christopher |             | Alumni           | 1942       |
| 2   | <a href="#">Carry ID</a> <a href="#">Detail</a> | AV0012                 | Waters    | Twaya       |             | Alumni           |            |
| 3   | <a href="#">Carry ID</a> <a href="#">Detail</a> | AV0017                 | Graham    | Tina        |             | Alumni           |            |

### Related Links

"Setting Up Search/Match" (Campus Community Fundamentals)

## 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" (Campus Community Fundamentals)"Adding or Updating Biographical Details Data" (Campus Community Fundamentals)

### Pages Used to Add People to the System

| Page Name            | Definition Name   | Navigation   | Usage   |
|----------------------|-------------------|--|---|
| Biographical Details | SCC_BIO_DEMO_PERS | <b>Contributor Relations &gt; Constituent Information &gt; People &gt; Add/Update a Person &gt; Biographical Details</b> | Enter biographical information, such as name, addresses, phone, email, gender, citizenship information, and marital status. |

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|------------------|------------------------|--|--|
| Regional         | SCC_BIO_DEMO_REG       | <b>Contributor Relations &gt; Constituent Information &gt; People &gt; Add/Update a Person &gt; Regional</b> | 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

| <i>Page Name</i>        | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>  |
|-------------------------|------------------------|--|---|
| Update Linked Addresses | RUNCTL_ADDRLINK        | <ul style="list-style-type: none"> <li>• <b>Campus Community &gt; Personal Information &gt; Biodemo Processes &gt; Update Linked Addresses</b></li> <li>• <b>Contributor Relations &gt; Constituent Information &gt; People &gt; Process Biodemo Information &gt; Update Linked Addresses</b></li> </ul> | Update linked addresses.  |
| Addresses               | ADDRESSES_89           | <b>Campus Community &gt; Personal Information &gt; Biographical &gt; Addresses/Phones &gt; Addresses</b>   | View or update a list of all addresses in the system for an individual. |
| Electronic Addresses    | E_ADDR_PERS            | <b>Campus Community &gt; Personal Information &gt; Biographical &gt; Addresses/Phones &gt; Electronic Addresses</b>  | Enter or review email and URL addresses for an individual.              |

| <b>Page Name</b>   | <b>Definition Name</b> | <b>Navigation</b>   | <b>Usage</b>  |
|--------------------|------------------------|---|---|
| Seasonal Addresses | CC_ADDR_SEASONAL       | <b>Campus Community &gt; Personal Information &gt; Biographical &gt; Addresses/Phones &gt; Seasonal Addresses</b> | Enter or review seasonal addresses for an individual. |
| Phones             | PHONE_PERS             | <b>Campus Community &gt; Personal Information &gt; Biographical &gt; Addresses/Phones &gt; Phones</b>             | 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" (Campus Community Fundamentals)

## Reviewing Address Data

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

### Related Links

"Entering Addresses for an Individual" (Campus Community Fundamentals)

## 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" (Campus Community Fundamentals)

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## 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" (Campus Community Fundamentals)

## 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" (Campus Community Fundamentals)

## 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

| <i>Page Name</i> | <i>Definition Name</i>                 | <i>Navigation</i>   | <i>Usage</i>                               |
|------------------|--|---|--|
| Constituent Type | AV_CNST_TYPE_TBL<br>AV_CNST_TYPE_TBL_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Constituent Information &gt; People &gt; Relationships &gt; Constituent Types</b></li> <li>• <b>Contributor Relations &gt; Constituent Information &gt; Workset &gt; Workset Constituent Info &gt; Relationships - Workset &gt; Constituent Types - Workset</b></li> </ul> | Assign constituent types to a constituent. |

| <b>Page Name</b>         | <b>Definition Name</b>                 | <b>Navigation</b>  | <b>Usage</b>  |
|--------------------------|--|--|---|
| Constituent Type Summary | AV_CNST_TYPE_INQ<br>AV_CNST_TYPE_INQ_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Constituent Information &gt; People &gt; Relationships &gt; Constituent Type Summary</b></li> <li>• <b>Contributor Relations &gt; Constituent Information &gt; Workset &gt; Workset Constituent Info &gt; Constituent Type Summary</b></li> </ul> | 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.

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Past</b>             | Select if the constituent no longer has a relationship with your institution. For example, if a constituent has a value of <i>Parent</i> and the child graduates, then select the <b>Past</b> option for the constituent type of <i>Parent</i> . |

**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" (Campus Community Fundamentals)

## 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" (Campus Community Fundamentals)

## 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

| <i>Page Name</i>    | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|---------------------|------------------------|---|--|
| Graduates To Alumni | AV_RUNCTL_CONFR        | <b>Contributor Relations &gt; Constituent Information &gt; People &gt; Process Biodemo Information &gt; Graduates to Alumni</b> | Run the process that adds a constituent type of <i>Alumni</i> 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**).

| <i>Field or Control</i>     | <i>Description</i>   |
|-----------------------------|--|
| <b>Report Only</b>          | 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 <i>Alumni</i> . You can run this report using the BI Publisher option. |
| <b>Academic Institution</b> | Enter the associated academic institution for the graduates.   |

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Academic Career</b>  | Select the associated academic career for the graduates. These values are defined by the institution.                             |
| <b>Completion Term</b>  | Enter the term in which the graduates were granted or will be granted their degrees. These values are defined by the institution. |
| <b>Constituent Type</b> | Displays <i>Alumni</i> , 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" (Student Records)

[Contributor Relations Reports: Selected Reports](#)

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## 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

| <i>Page Name</i>             | <i>Definition Name</i>       | <i>Navigation</i>  | <i>Usage</i>   |
|------------------------------|------------------------------|--|--|
| External Degrees             | AV_EXT_DEGR<br>AV_EXT_DEGR_W | <b>Contributor Relations</b> ><br><b>Constituent Information</b> ><br><b>People</b> > <b>Academic Information</b> > <b>External Degrees</b>                            | Add information about degrees that a constituent earned at institutions other than your own.   |
| Academic Information Summary | AV_ACAD_SUMM                 | <b>Contributor Relations</b> ><br><b>Constituent Information</b> ><br><b>People</b> > <b>Academic Information</b> > <b>Academic Information Summary</b>                | View a summary of information about a constituent's internal, external, and legacy degrees.  |
| Preferred Class Year         | AV_INT_DEGREE                | <b>Contributor Relations</b> ><br><b>Constituent Information</b> ><br><b>People</b> > <b>Academic Information</b> > <b>Class Year</b> > <b>Preferred Class Year</b>    | Enter a constituent's class year at your institution.<br>Preferred year appears on pages throughout the system when a person is the Level 0 key. |
| Internal Legacy Degrees      | AV_LEGACY_DEG                | <b>Contributor Relations</b> ><br><b>Constituent Information</b> ><br><b>People</b> > <b>Academic Information</b> > <b>Class Year</b> > <b>Internal Legacy Degrees</b> | 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**).

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.

### External Degrees

Shawn Gallegher ID: AV0001

Constituent Type: [Alumni](#) Year: [2001](#) PSUNV Prospect Manager: Mario Capozzelli

---

**Academic History** Find | View All First 1 of 1 Last

\*Org ID:  Lewis-Clark State College + -

---

**External Degrees** Find | View All First 1 of 1 Last

\*Degree Nbr:  \*Degree Date:  \*Data Source:  + -

Degree:  Bachelor of Arts

\*Honors Category:

\*Degree Status:

Ext Subj / Field of Study 1

Ext Subj / Field of Study 2

---

External Career:  Data Nbr:

Trans Date:  Trans Type:  Status:

[Org Primary Location](#)

| <b>Field or Control</b>           | <b>Description</b>  |
|-----------------------------------|---|
| <b>Org ID</b> (organization ID)   | Select the institution from which the constituent earned the external degree.   |
| <b>Degree Nbr</b> (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.  |
| <b>Data Source</b>                | 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.  |
| <b>Degree</b>                     | <p>Select the type of external degree received or in progress. Degrees are defined on the Degree Table page.</p> <hr/> <p><b>Note:</b> To enter a degree that is not defined in the Degree table, leave the <b>Degree</b> field blank and type the appropriate information in the <b>Description</b> field.</p> |
| <b>Honors Category</b>            | 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.  |

| <b>Field or Control</b>                                     | <b>Description</b>  |
|---|---|
| <b>Degree Status</b>  | Select the current status of the degree. Degree statuses are delivered with the system as translate values. You can modify these translate values.  |
| <b>External Subject Area/Field of Study</b>                 | 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. |
| <b>External Career</b>                                      | Select any external careers for the constituent. External careers are delivered with the system as translate values. You can modify these translate values.   |
| <b>Data Nbr</b> (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.   |
| <b>Org Primary Location</b> (organization primary location) | Click to view the primary address of the school to which this degree is related. On that page, click the <b>Detail</b> 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**).

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 Year**
Internal Legacy Degrees

Shawn Gallagher

**Constituent Type:** [Alumni](#)

**Preferred Class Yr:**

**ID:** AV0001

**Year:** [2001](#) PSUNV

**Alumnus Type:**

**Prospect Manager:** Mario Capozzelli

**Academic Progress** Find | View All | First 1 of 2 Last

**Career:** Undergraduate

**Campus:** Walnut Creek Campus

**Acad Prog:** Liberal Arts Undergraduate

**Academic Plan** Find | View All | First 1-2 of 2 Last

| Plan Type | Degree | Description | Confer Date | Degr Stat |
|-----------|--------|-------------|-------------|-----------|
| Major     | BA     | Classics-BA | 05/23/2001  | Awarded   |
| Minor     | BA     | Music Minor | 05/23/2001  | Awarded   |

| <i>Field or Control</i>                          | <i>Description</i>   |
|--|--|
| <b>Preferred Class Yr</b> (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.  |
| <b>Alumnus Type</b>                              | <p>Select the constituent's alumnus type. This field supports Part IV of the CAE report.</p> <p>The values for this field are shipped with the system. Values are:</p> <p><i>G</i>: Graduate.</p> <p><i>N</i>: Non-degree.</p> <p><i>U</i>: Undergraduate.</p> |

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**).

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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>  |
|------------------|------------------------|--|---|
| Work Experience  | PRIOR_WORK_EXP         | <ul style="list-style-type: none"> <li>Contributor Relations &gt; Constituent Information &gt; People &gt; Relationships &gt; Work Experience</li> <li>Contributor Relations &gt; Constituent Information &gt; Workset &gt; Workset Constituent Info &gt; Work Experience - Workset</li> </ul> | View information about a constituent's current and past employment. |

| <b>Page Name</b>          | <b>Definition Name</b> | <b>Navigation</b>  | <b>Usage</b>  |
|---------------------------|------------------------|--|---|
| Work Experience           | AV_EMPL_HIST           | <b>Contributor Relations</b> ><br><b>Constituent Information</b> ><br><b>People</b> > <b>Relationships</b> ><br><b>Work Experience History</b> | View a constituent's employment history.                        |
| Employment History Detail | AV_EMPL_HIST_SP        | Click the <b>Detail</b> link on the Work Experience inquiry page.  | View detailed information about an employee's record.           |
| Organization Locations    | AV_ORG_LOC_DTL_SP      | Click the <b>Locations</b> button on the Employment History Detail page.   | View information about an organization's physical locations.    |
| Phone Detail              | AV_EMP_PHONE_SP        | Click the <b>Phones</b> 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 <b>Email/URL</b> 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

| <i>Page Name</i>        | <i>Definition Name</i>         | <i>Navigation</i>  | <i>Usage</i>  |
|-------------------------|--------------------------------|--|---|
| Constituent Attachments | AV_CNST_ATCH<br>AV_CNST_ATCH_E | <ul style="list-style-type: none"> <li>Contributor Relations, Constituent Information, People, Person Attachments</li> <li>Contributor Relations, Constituent Information, People, Organization Attachments</li> </ul> | Create and view attachments to a person or organization record. |

## Creating Attachments

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

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.

**Constituent Attachments**

Shawn Gallegher ID: AV0001  
 Constituent Type: [Alumni](#) Year: [2001](#) PSUNV Prospect Manager: Mario Capozzelli

**Filter Criteria**

Attachment Type:

Document Date Range  
 From Date:  To Date:

Customize | Find | View All | First 1-2 of 2 Last

| Attached File            | Document Date | Description              | *Type | View                                |
|--------------------------|---------------|--------------------------|-------|-------------------------------------|
| WP_Leung_10HotSkills.pdf | 09/23/2009    | WP_Leung_10HotSkills.pdf | GEN   | <input type="button" value="View"/> |
| ipcfg.dat                | 09/23/2009    | ipcfg.dat                | PROP  | <input type="button" value="View"/> |

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Attachment Type</b>  | 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. |
| <b>Document Date</b>    | The system displays the date that the document was created or last updated. This is not the date that the file was attached.   |

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Type</b>             | Select a value; the system only displays types that have been defined on the Attachment Types page. |
| <b>View</b>             | Click the link to open the attachment in a new window.  |
| <b>Add</b>              | Click to access standard PeopleTools functionality to browse to a file and upload it.               |

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.

### Constituent Attachments

Shawn Gallegher ID: AV0001

Constituent Type: [Alumni](#) Year: [2001](#) PSUNV Prospect Manager: Mario Capozzelli

**Filter Criteria**

Attachment Type:  Document Date Range

From Date:   To Date:

Customize | Find | View All | First 1-2 of 2 Last

| Attached File            | Created By     | Created               | Updated By     | Updated               |   |
|--------------------------|----------------|-----------------------|----------------|-----------------------|---|
| WP_Leung_10HotSkills.pdf | Betty Locherty | 09/23/2009 11:52:43AM | Betty Locherty | 09/23/2009 11:52:43AM | - |
| ipcfg.dat                | Betty Locherty | 09/23/2009 11:53:10AM | Betty Locherty | 09/23/2009 11:53:10AM | - |

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" (Campus Community Fundamentals)

---

## 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" (Campus Community Fundamentals)

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## 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" (Campus Community Fundamentals)

---

## 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" (Campus Community Fundamentals)

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## 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<br>AV_ORG_FIN_INFO_W | <ul style="list-style-type: none"> <li>Contributor Relations &gt; Constituent Information &gt; Organization &gt; Organization Information &gt; Organization Financial Info</li> <li>Contributor Relations &gt; Constituent Information &gt; Workset &gt; Workset Constituent Info &gt; Organization Financial Info</li> </ul> | 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**).

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.

### Organization Financial Info

Ford Motor Company ID: AV1000

**Constituent Type:** Corporation **Institution:** PSUNV **Prospect Manager:** NONE

**Organization Information**

**Employee Count:**  **\*Cnst Type:**  Corporation

**Alumni Count:**  **Stck Exch:**  **Symbol:**

**Description:**  **SIC:**

**Financial Information** Find | View All First 1 of 1 Last

**Fiscal Year:**  **From Date:**  **To Date:**

**Revenue Amount:**  CAD **Assets Amount:**

**Expenses Amount:**  **Liability Amount:**

**Profit/Loss Amount:**  **Equity Amount:**

**Source Description:**  **Contributions Total:**  USD

**Date:**

| Field or Control | Description  |
|------------------|--|
| Employee Count   | Enter the number of people currently employed at the organization. |

| <b>Field or Control</b>           | <b>Description</b>  |
|-----------------------------------|---|
| <b>Alumni Count</b>               | 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.  |
| <b>Stck Exch</b> (stock exchange) | Select the name of the stock exchange in which the organization's stock trades, if applicable. Values are: <i>AMEX</i> , <i>NASDAQ</i> , and <i>NYSE</i> .  |
| <b>Symbol</b>                     | Enter the stock exchange symbol under which the organization's stock trades, if applicable. You can enter up to 10 characters.  |
| <b>Description</b>                | Enter a description of the organization and the type of business it runs. You can enter up to 30 characters.  |
| <b>SIC</b>                        | Select the Standard Industrial Code for the organization.   |
| <b>Fiscal Year</b>                | Enter the four-digit fiscal year for which you are recording financial information.   |
| <b>From Date and To Date</b>      | 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.<br><br>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 <b>To Date</b> field. |
| <b>Revenue Amount</b>             | Enter the total amount that the organization received in revenues during the fiscal year.   |
| <b>Base</b>                       | 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 <b>Entry</b> . Click the button again to toggle back to entry mode, where you can change the values.  |
| <b>Expenses Amount</b>            | Enter the total amount that the organization incurred as expenses during the fiscal year.   |
| <b>Profit/Loss Amount</b>         | Displays the organization's profit or loss for the fiscal year that you selected, based on revenue minus expenses.  |
| <b>Assets Amount</b>              | Enter the total worth of all assets held by the organization during the fiscal year.  |

| <b>Field or Control</b>            | <b>Description</b>   |
|------------------------------------|--|
| <b>Liability Amount</b>            | Enter the total amount of all liabilities owed by the organization during the fiscal year.   |
| <b>Equity Amount</b>               | Displays the organization's total equity for the fiscal year that you entered, based on assets minus liability.  |
| <b>Source Description and Date</b> | Enter the person or publication that provides organization financial information to your institution, and the date on which organization financial information was obtained. |
| <b>Contributions Total</b>         | 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

| <b>Page Name</b> | <b>Definition Name</b> | <b>Navigation</b>   | <b>Usage</b>   |
|------------------|------------------------|---|--|
| Foundation       | AV_ORG_FND_INFO        | <b>Contributor Relations</b> ><br><b>Constituent Information</b> ><br><b>Organizations</b> ><br><b>Organization Information</b> ><br><b>Organization Foundation Information</b> | 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. |

| <b>Page Name</b>                     | <b>Definition Name</b> | <b>Navigation</b>  | <b>Usage</b>   |
|--------------------------------------|------------------------|--|--|
| Support Areas                        | AV_ORG_FND_SUPP        | <b>Contributor Relations &gt; Constituent Information &gt; Organizations &gt; Organization Information &gt; Organization Foundation Information &gt; Support Areas</b> | 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        | <b>Contributor Relations &gt; Constituent Information &gt; Organizations &gt; Organization Information &gt; Organization Foundation Information &gt; Proposal Info</b> | 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**).

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

Foundation
Support Areas
Proposal Info

American Enrichment Foundation **ID:** AV1012

**Constituent Type:** Foundation **Institution:** PSUNV **Prospect Manager:** NONE

**Basic Information**

**Parent Company:**

**Established:**  **\*Foundation Type:**  Private Foundation

**Purpose and Activities**

Supports community activities

**Financial Information**

Find | View All
First 1 of 1 Last

**\*Fiscal Year:**  **From Date:**  **To Date:**

|                             |  |     |                              |   |
|-----------------------------|--|-----|------------------------------|---|
| <b>Assets Amount:</b>       | <input type="text" value="10,000,000.00"/> | USD | <b>Grants Amount:</b>        | <input type="text" value="2,500,000.00"/> |
| <b>Expenditures Amount:</b> | <input type="text" value="5,000,000.00"/>  |     | <b>Highest Grant Amount:</b> | <input type="text" value="150,000.00"/>   |
| <b>Distribution Amount:</b> | <input type="text" value="2,500,000.00"/>  |     | <b>Lowest Grant Amount:</b>  | <input type="text" value="100,000.00"/>   |
| <b>Date:</b>                | <input type="text" value="03/06/2006"/>    |     | <b>Average Grant Amount:</b> | <input type="text" value="125,000.00"/>   |

**Source:**

## Basic Information

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Parent Company</b>   | Select the external organization that is the parent of the foundation. The <b>Create Relationship</b> link enables you to create an organization-to-organization relationship if one is not defined in the system. |
| <b>Established</b>      | The date on which the organization was established.  |
| <b>Foundation</b>       | Indicate whether a foundation is company-sponsored, private, family-based, and so on. <i>Corporate</i> , <i>Family</i> , and <i>Private</i> 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.

| <b>Field or Control</b>      | <b>Description</b>  |
|------------------------------|---|
| <b>Fiscal Year</b>           | The financial reporting year for which the financial data is pertinent.                       |
| <b>From Date and To Date</b> | The first and last date of the fiscal year to which the data pertains.                        |
| <b>Assets Amount</b>         | The financial holdings of the foundation.   |
| <b>Expenditures Amount</b>   | The amount of expenses the foundation had in the related year.                                |
| <b>Distribution Amount</b>   | The amount of funding available to be distributed as grants or funded proposals.              |
| <b>Date</b>                  | The date the information was obtained from the source.  |
| <b>Source</b>                | The originator of the foundation financial information, for example the Foundation Directory. |

| <b>Field or Control</b>     | <b>Description</b>   |
|-----------------------------|--|
| <b>Grants Amount</b>        | The amount actually funded, which may differ from the distribution amount if all funding is not awarded. |
| <b>Highest Grant Amount</b> | The largest grant awarded by the foundation.   |
| <b>Lowest Grant Amount</b>  | The smallest grant awarded by the foundation.  |
| <b>Average Grant Amount</b> | 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**).

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.

Foundation
Support Areas
Proposal Info

American Enrichment Foundation      **ID:** AV1012

**Constituent Type:** Foundation      **Institution:** PSUNV      **Prospect Manager:** NONE

**Fields of Interest** Customize | Find | View All | First 1 of 1 Last

| *Interest                                | Description |
|--|-------------|
| <input style="width: 90%;" type="text"/> |             |
| <input type="button" value="Add"/>       |             |

**Geographic Areas** Customize | Find | View All | First 1 of 1 Last

| *Area  | Description              |
|--|--------------------------|
| NATIONAL <input style="width: 10px;" type="text"/> | National Granting Agency |
| <input type="button" value="Add"/>                 |                          |

**Types of Support** Customize | Find | View All | First 1 of 1 Last

| *Support Type                                       | Description |
|---|-------------|
| BUILDINGS <input style="width: 10px;" type="text"/> | Buildings   |
| <input type="button" value="Add"/>                  |             |

| <b>Field or Control</b>   | <b>Description</b>   |
|---------------------------|--|
| <b>Fields of Interest</b> | Enter areas of charitable interest involvement that the foundation is known to support financially. The involvement code description appears at the right. |

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Geographic Areas</b> | Enter any geographic restrictions that the foundation considers when selecting proposals for funding. The description appears at the right.   |
| <b>Types of Support</b> | Indicate the kinds of activities the foundation supports. Delivered system values include: <i>Capital Campaigns, Building/Renovation, Equipment, Program Development, Seed Money, Curriculum Development, and Matching/Challenge.</i> |

## Defining Proposal Information

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

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.

The screenshot displays the 'Proposal Info' page for the American Enrichment Foundation. The page header includes navigation tabs for 'Foundation', 'Support Areas', and 'Proposal Info'. Key information shown includes the organization's ID (AV1012), constituent type (Foundation), institution (PSUNV), and prospect manager (NONE). The 'Proposal Application Info' section contains a 'Contact Type' dropdown set to 'LETTER' and a 'Contact' field. Below this are three tables for scheduling: 'Deadlines' (with entries for June 15 and December 15), 'Board Meeting Dates' (with entries for January 15, March 15, July 15, and October 15), and 'Notification Dates' (with entries for February 1 and August 1). Each table has a 'View All' and 'First' button and an 'Add' button at the bottom.

| <b>Field or Control</b>         | <b>Description</b>  |
|---------------------------------|---|
| <b>Contact Type and Contact</b> | The organization contact that is responsible for proposal reviews for the foundation. |

| <i>Field or Control</i>    | <i>Description</i>  |
|----------------------------|---|
| <b>Deadlines</b>           | 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. |
| <b>Board Meeting Dates</b> | The months and dates, such as March 15, when the foundation board meets to review proposals.  |
| <b>Notification Dates</b>  | 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

| <i>Page Name</i>                    | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|-------------------------------------|------------------------|---|---|
| Organization Foundation Information | AV_ORG_FND_INQ         | <b>Contributor Relations</b> ><br><b>Constituent Information</b> ><br><b>Organizations</b> ><br><b>Organization Information</b> ><br><b>Review Foundation Information</b> | 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       | <b>Contributor Relations</b> ><br><b>Constituent Information</b> ><br><b>Organizations</b> ><br><b>Organization Information</b> ><br><b>Foundation Summary</b>            | Filter the types of foundations that you view on the Foundation Summary page.   |

| <i>Page Name</i>   | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|--------------------|------------------------|---|--|
| Foundation Summary | AV_ORG_FND_INQ_D       | <b>Contributor Relations</b> ><br><b>Constituent Information</b> ><br><b>Organizations</b> ><br><b>Organization Information</b> ><br><b>Foundation Summary</b> ><br><b>Foundation Summary</b> | 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.

| <i>Field or Control</i>     | <i>Description</i>                                       |
|-----------------------------|--|
| <b>Proposal Information</b> | 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.

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## 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](#)

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## 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" (Campus Community Fundamentals)

## Viewing an Organization's Employee List

This section discusses how to view employee lists.

### Page Used to View an Organization's Employee List

| <i>Page Name</i> | <i>Definition Name</i>           | <i>Navigation</i>   | <i>Usage</i>  |
|------------------|----------------------------------|---|---|
| Employee List    | AV_EMPL_LIST_E<br>AV_EMPL_LIST_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Constituent Information &gt; Organizations &gt; Relationships &gt; Employee List</b></li> <li>• <b>Contributor Relations &gt; Constituent Information &gt; Workset &gt; Workset Constituent Info &gt; Employee List</b></li> </ul> | 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:

| <i>Data Region</i>                | <i>Profile View</i> |
|-----------------------------------|---------------------|
| 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          |

| <b>Data Region</b>   | <b>Profile View</b> |
|----------------------|---------------------|
| 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

| <b>Page Name</b> | <b>Definition Name</b>               | <b>Navigation</b>  | <b>Usage</b>  |
|------------------|--------------------------------------|--|---|
| Person Profile   | AV_PRSN_PROFILE<br>AV_PRSN_PROFILE_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Constituent Information &gt; People &gt; Person Profile</b></li> <li>• <b>Contributor Relations &gt; Constituent Information &gt; Workset &gt; Workset Constituent Info &gt; Person Profile - Workset</b></li> <li>• <b>Self Service &gt; Outreach &gt; View Prsn &gt; Person Profile</b></li> <li>• <b>Self Service &gt; Outreach &gt; View Lists &gt; Person Profile</b></li> </ul> | 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**).

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.

| <b>Field or Control</b>            | <b>Description</b>  |
|------------------------------------|---|
| <b>Constituent Type</b>            | Click to access the Constituent Type Summary page, which lists all types assigned to a constituent.   |
| <b>Year</b>                        | <p>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.</p> <p>If no class year exists but the system has academic information for the constituent, then <i>None</i> appears here as a link. Click the link to access the Academic Information inquiry component.</p> |
| <b>Profile View</b>                | Select a profile view— <i>Biographic</i> , <i>Commitment</i> , or <i>Participation</i> —to expand it below and populate its data regions. Click the arrow next to the name of the region to expand or collapse data regions manually.   |
| <b>Printer Friendly Version</b>    | <p>Click to access a read-only version of the page that expands all rows of all populated data regions. You can print this page using your browser's print functionality.</p> <p>Click the <b>Return</b> button to return to the Person Profile page.</p>   |
| <b>Expand All and Collapse All</b> | Click to either expand or collapse all data regions below.  |

| <b>Field or Control</b>   | <b>Description</b>  |
|---------------------------|---|
| <b>Clearance Required</b> | If this check box is selected, clearance is required before contacting the constituent. Set Clearances on the Clearance page.   |
| <b>Prospect Manager</b>   | <p>Displays the name of the constituent's assigned prospect manager. Prospect managers are assigned on the Staff Assignment, Volunteer Assignment, and Unit Assignment pages.</p> <p>If the prospect manager has an active email address on the Electronic Addresses page, the name appears as a link. Click the link to launch your email application and send a message to that person.</p> |

### Additional Information

The system displays messages at the bottom of the page based on the following conditions:

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**Note:** Where no data exists, the system hides the data region.

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| <b>Data Region</b>                   | <b>Condition</b>  | <b>Message</b>                       |
|--------------------------------------|---|--------------------------------------|
| 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<br>Historical Giving | No data exists.   | No Giving Information on file.       |
|                                      | Data exists, but user does not have access to the Person Giving Profile page from any menu.     | Giving Information on file.          |
| Work Experience                      | No data exists.   | No Work Experience on file.          |
| Academic Information                 | No data exists.   | No Academic Information on file.     |
| Relationships                        | No data exists.   | No Relationship information on file. |

| <b>Data Region</b>                | <b>Condition</b>      | <b>Message</b>   |
|-----------------------------------|-----------------------|--|
| 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:

| <b>Additional Information</b> | <b>Condition</b>  | <b>Message</b>                               |
|-------------------------------|---|--|
| Academic Information          | No data exists, and the <b>Class Year</b> 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" (Campus Community Fundamentals)

## Viewing a Biographic Profile

Access the Person Profile page, Biographic Profile view.

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.

| ▼ Biographic Information |            |                              |              |                         |      |  |
|--------------------------|------------|------------------------------|--------------|-------------------------|------|--|
| <b>Date of Birth:</b>    | 10/20/1959 | <b>Date of Death:</b>        |              | <b>Gender:</b>          | Male |  |
| <b>Ethnic Group:</b>     |            | <b>Religious Preference:</b> |              | <b>Military Status:</b> |      |  |
| <b>Marital Status:</b>   | Married    | <b>Spouse:</b>               | Sally Randle |                         |      |  |

| ▼ Current Addresses                                       |                                      |                |        |
|---|--------------------------------------|----------------|--------|
| Personalize   Find   View All         First 1-2 of 2 Last |                                      |                |        |
| Address Type  | Address                              | Effective Date | Status |
| Business  | ADDRESS1<br>ADDRESS2<br>ADDRESS3     | 10/27/1998     | Active |
| Home  | 389 Rose Street<br>Oakland, CA 94609 | 07/03/1998     | Active |

| ▼ Phone Numbers   |        |       |           |                                     |
|---|--------|-------|-----------|-------------------------------------|
| Personalize   Find   View All         First 1-2 of 2 Last |        |       |           |                                     |
| Phone Type  | Prefix | Phone | Extension | Preferred                           |
| Business  |        |       |           | <input type="checkbox"/>            |
| Main  |        |       |           | <input checked="" type="checkbox"/> |

| ▼ Email Addresses   |  |                                     |
|---|--|-------------------------------------|
| Personalize   Find   View All         First 1-2 of 2 Last |  |                                     |
| Email Type  | Email Address  | Preferred                           |
| Business  | <a href="mailto:HCMGENUser1@ap6023fems.us.oracle.com">HCMGENUser1@ap6023fems.us.oracle.com</a> | <input checked="" type="checkbox"/> |
| Home  | <a href="mailto:HCMGENUser1@ap6023fems.us.oracle.com">HCMGENUser1@ap6023fems.us.oracle.com</a> | <input type="checkbox"/>            |

| ▼ Academic Information                                    |      |                      |             |        |        |        |
|---|------|----------------------|-------------|--------|--------|--------|
| Personalize   Find   View All         First 1-3 of 4 Last |      |                      |             |        |        |        |
| Institution Name  | Year | Degree               | Major1      | Major2 | Minor1 | Minor2 |
| Springfield College                                       | 1984 | Master of Arts       | English     |        |        |        |
| PeopleSoft University                                     | 1999 | Bachelor of Arts     | Classics-BA |        |        |        |
| PeopleSoft University                                     | 1999 | Doctor of Philosophy | English-PhD |        |        |        |

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<br>Electronic Addresses                                    |
| Biographic Information | Bio/Demo Data<br>Religious Preferences<br>Relationships<br>Decedent Data |

| <b>Information Section</b> | <b>Page</b>  |
|----------------------------|--|
| Work Experience            | Work Experience                                      |
| Academic Information       | Academic Information Summary                         |
| Relationships              | Relationships<br>Person to Org Relationships         |
| Attachments                | Constituent Attachments                              |
| Organization Contacts      | Organization Contacts<br>Organization Contact Detail |

## Biographic Information

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

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Date of Death</b>    | 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.

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Address Type</b>     | Select the type of address that you want to appear.<br><br>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

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Phone Type</b>       | Select the type of phone information that you want to appear. |

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Preferred</b>        | The check box is selected next to the preferred phone number on file in the system. |

### Email Addresses

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Email Type</b>       | Select the type of email address information that you want to appear.  |
| <b>Email Address</b>    | 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. |
| <b>Preferred</b>        | The check box is selected next to the preferred email address on file in the system.   |

### Work Experience

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Employer</b>         | 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

| <i>Field or Control</i>   | <i>Description</i>  |
|---|---|
| <b>Relationship</b>   | 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. |

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

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## 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

| <i>Field or Control</i>   | <i>Description</i>  |
|---|---|
| <b>Organization Name</b>  | 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.

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.

|   |              |                                      |          |
|---|--------------|--------------------------------------|----------|
| <b>▼ Lifetime Giving</b>                  |              |                                      |          |
| <a href="#">Lifetime Commitments</a>      | 5,000.00 USD | <b>Lifetime Hard Credits:</b>        | 1,500.00 |
| <b>Lifetime Open Pledges:</b>             | 3,500.00     | <b>Largest Pledge:</b>               | 3,000.00 |
| <b>Lifetime Gifts/Payments:</b>           | 1,500.00     | <b>Largest Gift:</b>                 | 1,500.00 |
| <b>▼ Historical Giving</b>                |              |                                      |          |
| <a href="#">Total Year-to-Date Giving</a> | 0.00         | <b>First Gift Year:</b>              | 2006     |
| <b>Total Prior Year Giving:</b>           | 0.00         | <b>Total Years Giving:</b>           | 1        |
| <b>Last Gift Date:</b>                    | 09/10/2006   | <b>Consecutive Years Giving:</b>     | 0        |
| <b>Last Gift Amount:</b>                  | 1,500.00     | <a href="#">Transaction Register</a> |          |

The system derives information for the Commitment Profile view from the Giving Profile page.

## Lifetime Giving

| <i>Field or Control</i>     | <i>Description</i>   |
|-----------------------------|--|
| <b>Lifetime Commitments</b> | Click to access the Giving Profile page for the constituent. |

## Historical Giving

| <i>Field or Control</i>          | <i>Description</i>   |
|----------------------------------|--|
| <b>Total Year-to-Date Giving</b> | Click to access the Giving Profile page for the constituent.                         |
| <b>Transaction Register</b>      | 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.

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.

| ▼ Involvement <span style="float:right">Customize   Find   View All    First 1-3 of 6 Last</span> |                      |                                  |            |            |               |  |
|---|----------------------|----------------------------------|------------|------------|---------------|--|
| Involvement Type  | Involvement Category | Involvement                      | Start Date | End Date   | Received Date |  |
| Activity  | Academic             | <a href="#">Marching Band</a>    | 09/12/1973 | 12/30/1976 |               |  |
| Affiliation   | Political            | <a href="#">Democratic Party</a> |            |            |               |  |
| Award/Honor   | Charitable           | <a href="#">United Way</a>       |            |            | 06/12/1998    |  |

| ▼ Memberships <span style="float:right">Customize   Find   View All    First 1-2 of 2 Last</span> |                   |               |               |                 |            |                 |
|---|-------------------|---------------|---------------|-----------------|------------|-----------------|
| Membership Organization   | Membership Number | Business Unit | Description   | Membership Type | Start Date | Expiration Date |
| <a href="#">ALUMASSN</a>  | 57                | PSUNV         | Annual Single | ANNUAL          | 09/10/2006 | 09/10/2007      |
| <a href="#">FINE ARTS</a>   | 58                | PSUNV         |               |                 | 09/10/2006 |                 |

| ▼ Additional Information   |
|--|
| No Volunteer Activity information on file<br>No Planned Giving Donor information on file<br>Ratings information on file<br>Resources are assigned to constituent<br>No Constituent Attachments on file |

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

| <b>Information Section</b> | <b>Page</b>   |
|----------------------------|---|
| Involvement                | Involvement Summary                                 |
| Volunteer Activities       | Volunteer History                                   |
| Membership                 | Membership History Prsn (membership history person) |

## Involvement

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Involvement</b>      | Click a link to access the Involvement Detail page for the constituent. |

## Volunteer Activities

| <b>Field or Control</b>                        | <b>Description</b>   |
|--|--|
| <b>Volunteer Role</b>                          | Click a link to access the Volunteer Assignment Detail page for the constituent. |
| <b>Volunteer Group and Volunteer Sub Group</b> | These columns display the group or subgroup to which the volunteer belongs.      |

## Memberships

| <b>Field or Control</b>        | <b>Description</b>  |
|--------------------------------|---|
| <b>Membership Organization</b> | Click a link to access the Membership Detail page for the constituent.<br><br>If business unit security is active, the system only displays member organizations for accessible business units. |

## Related Links

[Maintaining Involvement Information](#)

[Reviewing Volunteer History](#)

[Viewing Membership History](#)

## 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:

| <b>Data Region</b>                 | <b>Profile View</b>         |
|------------------------------------|-----------------------------|
| 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.

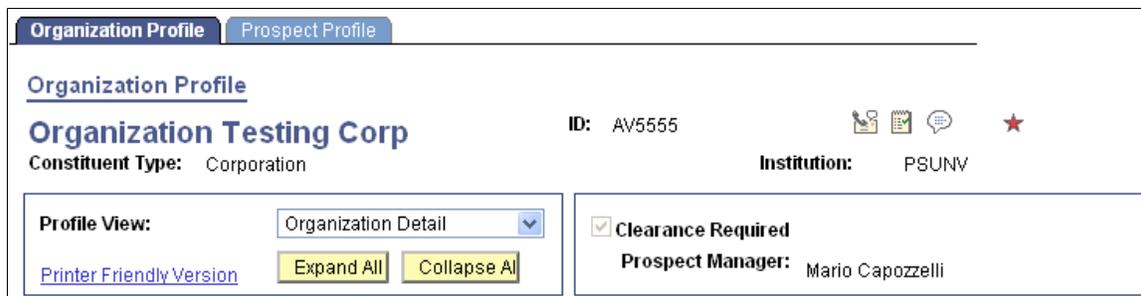
## Page Used to View an Organization Profile

| <i>Page Name</i>     | <i>Definition Name</i>             | <i>Navigation</i>  | <i>Usage</i>  |
|----------------------|------------------------------------|--|---|
| Organization Profile | AV_ORG_PROFILE<br>AV_ORG_PROFILE_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Constituent Information &gt; Organizations &gt; Organization Profile</b></li> <li>• <b>Contributor Relations &gt; Constituent Information &gt; Workset &gt; Workset Constituent Info &gt; Organization Profile</b></li> </ul> | 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.

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.

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Profile View</b>     | Select a profile view— <i>Organization Detail</i> , <i>Organization Financial Info</i> , <i>Commitment</i> , or <i>Participation</i> —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. |

| <b>Field or Control</b>            | <b>Description</b>   |
|------------------------------------|--|
| <b>Printer Friendly Version</b>    | <p>Click to access a read-only version of the page that expands all rows of all populated data regions. You can print this page using your browser's print functionality.</p> <p>Click the <b>Return</b> button to return to the Organization Profile page.</p>  |
| <b>Expand All and Collapse All</b> | Click to either expand or collapse all data regions below.   |
| <b>Clearance Required</b>          | If this check box is selected, clearance is required before contacting the organization. Clearances are set on the Clearance page.   |
| <b>Prospect Manager</b>            | <p>Displays the name of the organization's assigned prospect manager. Prospect managers are assigned on the Staff Assignment, Volunteer Assignment, and Unit Assignment pages.</p> <p>If the prospect manager has an active email address on the Electronic Addresses page, the name appears as a link. Click the link to launch your email application and send a message to that person's preferred email address.</p> |

### Additional Information

The system displays messages at the bottom of the page based on the following conditions:

---

**Note:** Where no data exists, the system hides the data region.

---

| <b>Data Region</b>       | <b>Condition</b>      | <b>Message</b>                      |
|--------------------------|-----------------------|-------------------------------------|
| 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  |

| <b>Data Region</b>                   | <b>Condition</b>  | <b>Message</b>                                |
|--------------------------------------|---|---|
| Organization Financial Information   | No data exists.   | No Organization Financial Information on file |
| Lifetime Giving<br>Historical Giving | No data exists.   | Constituent is not a donor                    |
|                                      | 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:

| <b>Additional Information</b> | <b>Condition</b>   | <b>Message</b>                                     |
|-------------------------------|--|--|
| 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.

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.

**▼ Location**

**Location:**   **Primary**

2345 Picadilly Circle, Suite 4500  
Mailstop 5-1  
London, LINC8 AB7B 9AA, GBR

**Phone Type:** Business

**Telephone:** 01 2/456-2356

**Email ID:** [czsmith@orgtesting.com](mailto:czsmith@orgtesting.com)

**URL Address:** [www.orgtesting.com](http://www.orgtesting.com)

**▼ Organization Departments**

[Customize](#) | [Find](#) | [View All](#) |  First  1-2 of 2  Last

| Department         | Department Type | Contact Name | Status |                         |
|--------------------|-----------------|--------------|--------|-------------------------|
| Office of Goodwill | Adm Dept        |              | Active | <a href="#">Details</a> |
| Accounts Payable   | Adm Dept        |              | Active | <a href="#">Details</a> |

**▼ Organization Contacts**

[Customize](#) | [Find](#) | [View All](#) |  First  1-2 of 2  Last

| Contact Name                    | Contact Type | Job Title                  | Status |                         |
|---------------------------------|--------------|----------------------------|--------|-------------------------|
| <a href="#">Wale, Tanya</a>     | Matching G   | Director of Matching Gifts | Active | <a href="#">Details</a> |
| <a href="#">Heller, Miranda</a> | Primary      | Accounts Payable Manager   | Active | <a href="#">Details</a> |

**▼ Relationships**

[Customize](#) | [Find](#) | [View All](#) |  First  1-3 of 5  Last

| Name                  | Relationship                   | Constituent Type        | Year | Begin Date | End Date |
|-----------------------|--------------------------------|-------------------------|------|------------|----------|
| The Other Corporation | <a href="#">Parent Company</a> | Other Organization Type |      | 07/12/2005 |          |
| Ryan Agency           | <a href="#">Subsidiary</a>     | Corporation             |      | 07/26/2005 |          |
| Mister Systems        | <a href="#">Parent Company</a> |                         |      | 07/26/2005 |          |

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

| <b>Information Section</b> | <b>Page</b>  |
|----------------------------|--|
| Location                   | Location Detail  |
| Organization Departments   | Department Detail                                      |
| Organization Contacts      | Contact Detail   |
| Relationships              | Organization Relationships<br>Org/Person Relationships |
| Attachments                | Constituent Attachments                                |

## Location

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Location</b>         | When you select a location, the system populates the address, phone, email, and URL address information.  |
| <b>Phone Type</b>       | The system displays the selected phone type.  |
| <b>Email ID</b>         | 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. |
| <b>URL Address</b>      | 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

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Phone</b>            | Click the link to access the Department Phone Information page.    |
| <b>Location</b>         | Click the link to access the Department Location Information page. |

## Organization Contacts

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Contact Name</b>     | Click to access the Organization Contact Phone information page. |
| <b>Location</b>         | 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.

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Relationship</b>     | 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.

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.

| ▼ Organization Attributes   |                                     | Find   View All             |             | First 1 of 1 Last |  |
|-----------------------------|-------------------------------------|-----------------------------|-------------|-------------------|--|
| <b>Organization Type:</b>   | Business                            | <b>Parent Organization:</b> | Ryan Agency |                   |  |
| <b>Proprietorship:</b>      | Public                              | <b>Parent ID:</b>           | AV1070      |                   |  |
| <b>Stock Exchange:</b>      | NASDAQ                              | <b>Employee Count:</b>      | 3,200       |                   |  |
| <b>Symbol:</b>              | OTHC                                | <b>Alumni Count:</b>        | 2           |                   |  |
| <b>Industry Code (SIC):</b> | 7373 Comp. Integrated System Design | <b>Foundation Type:</b>     |             |                   |  |

| ▼ Organization Financial Information |            |            | Customize   Find   View All |                 |               | First 1-2 of 2 Last |                     |
|--------------------------------------|------------|------------|-----------------------------|-----------------|---------------|---------------------|---------------------|
| Fiscal Year                          | From Date  | To Date    | Revenue Amount              | Expenses Amount | Assets Amount | Liability Amount    | Contributions Total |
| 2004                                 | 01/01/2004 | 12/31/2004 | 103,000,000.00              | 65,000,000.00   | 95,000,000.00 | 10,000,000.00       | 4,000,000.00        |
| 2003                                 | 01/01/2003 | 12/31/2003 | 94,000,000.00               | 45,000,000.00   | 50,000,000.00 | 5,000,000.00        | 2,000,000.00        |

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

| <i>Information Section</i>         | <i>Page</i>                        |
|------------------------------------|------------------------------------|
| Organization Attributes            | Organization Financial Information |
| Organization Financial Information | Organization Financial Information |

## Organization Attributes

| <i>Field or Control</i>                | <i>Description</i>   |
|--|--|
| <b>Stock Exchange and Symbol</b>       | Displays the name of the stock exchange and the stock exchange symbol under which the organization's stock trades.   |
| <b>Industry Code (SIC)</b>             | Displays the Standard Industrial Code for the organization.  |
| <b>Employee Count and Alumni Count</b> | 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

| <i>Field or Control</i>    | <i>Description</i>   |
|----------------------------|--|
| <b>Revenue Amount</b>      | Displays the total amount the organization received in revenues during the fiscal year.  |
| <b>Expenses Amount</b>     | Displays the total amount the organization incurred as expenses during the fiscal year.  |
| <b>Assets Amount</b>       | Displays the total worth of all assets held by the organization during the fiscal year.  |
| <b>Liability Amount</b>    | Displays the total amount of all liabilities owed by the organization during the fiscal year.  |
| <b>Contributions Total</b> | 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.

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.

|   |               |                                      |          |
|---|---------------|--------------------------------------|----------|
| <b>▼ Lifetime Giving</b>                  |               |                                      |          |
| <a href="#">Lifetime Commitments</a>      | 19,060.00 USD | <b>Lifetime Hard Credits:</b>        | 9,060.00 |
| <b>Lifetime Open Pledges:</b>             | 10,000.00     | <b>Largest Pledge:</b>               | 6,000.00 |
| <b>Lifetime Gifts/Payments:</b>           | 9,060.00      | <b>Largest Gift:</b>                 | 5,000.00 |
| <b>▼ Historical Giving</b>                |               |                                      |          |
| <a href="#">Total Year-to-Date Giving</a> | 0.00          | <b>First Gift Year:</b>              | 2006     |
| <b>Total Prior Year Giving:</b>           | 0.00          | <b>Total Years Giving:</b>           | 1        |
| <b>Last Gift Date:</b>                    | 09/10/2006    | <b>Consecutive Years Giving:</b>     | 0        |
| <b>Last Gift Amount:</b>                  | 1,000.00      | <a href="#">Transaction Register</a> |          |
| <b>▼ Matching Gifts</b>                   |               |                                      |          |
| <b>Lifetime Match:</b>                    | 1,000.00      | <b>YTD Match:</b>                    | 0.00     |
| <b>Open Matches:</b>                      | 0.00          | <b>Prev Yr Match:</b>                | 0.00     |
| <a href="#">Matching Gift Rules</a>       |               |                                      |          |

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

| <b>Information Section</b> | <b>Page</b>            |
|----------------------------|------------------------|
| 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

| <b>Field or Control</b>     | <b>Description</b>  |
|-----------------------------|---|
| <b>Lifetime Commitments</b> | Click to access the Giving Profile page for the organization. |

### Historical Giving

| <b>Field or Control</b>          | <b>Description</b>  |
|----------------------------------|---|
| <b>Total Year-to-Date Giving</b> | Click to access the Giving Profile page for the organization. |

| <b>Field or Control</b>     | <b>Description</b>   |
|-----------------------------|--|
| <b>Transaction Register</b> | Click to access the Transaction Register - Org page to view more giving details. |

### Matching Gifts

| <b>Field or Control</b>    | <b>Description</b>  |
|----------------------------|---|
| <b>Lifetime Match</b>      | Click to access the Ext Org Matching Gifts page for the organization. |
| <b>Matching Gift Rules</b> | 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.

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.

| <b>▼ Involvement</b> <span style="float:right">Customize   Find   View All    First 1-3 of 3 Last</span> |                             |  |                   |                 |                      |  |
|--|-----------------------------|--|-------------------|-----------------|----------------------|--|
| <u>Involvement Type</u>  | <u>Involvement Category</u> | <u>Involvement</u>                           | <u>Start Date</u> | <u>End Date</u> | <u>Received Date</u> |  |
| Interest   | Charitable                  | <a href="#">College of Bus. Coop Program</a> | 09/04/2006        |                 |                      |  |
| Award/Honor  | Charitable                  | <a href="#">United Way</a>                   |                   |                 | 03/16/2004           |  |
| Affiliation  | Professional                | <a href="#">Metropolitan Arts Council</a>    | 02/04/2002        |                 |                      |  |

| <b>▼ Memberships</b> <span style="float:right">Customize   Find   View All    First 1-3 of 3 Last</span> |                          |                      |                    |                        |                   |                        |
|--|--------------------------|----------------------|--------------------|------------------------|-------------------|------------------------|
| <u>Membership Organization</u>   | <u>Membership Number</u> | <u>Business Unit</u> | <u>Description</u> | <u>Membership Type</u> | <u>Start Date</u> | <u>Expiration Date</u> |
| <a href="#">ALUMASSN</a>   | 59                       | PSUNV                | Annual Single      | ANNUAL                 | 09/10/2006        | 09/10/2008             |
| <a href="#">FINE ARTS</a>  | 60                       | PSUNV                |                    |                        | 09/10/2006        |                        |
| <a href="#">PHXCHAP</a>  | 61                       | PSUNV                | Annual Membership  | ANNUAL                 | 09/10/2006        | 09/10/2007             |

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

| <b>Information Section</b> | <b>Page</b>  |
|----------------------------|--|
| Involvement                | Involvement Summary                                      |
| Memberships                | Membership History Org (membership history organization) |

## Involvement

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Involvement</b>      | Click a link to access the Involvement Detail page for the organization. |

## Memberships

| <i>Field or Control</i>        | <i>Description</i>   |
|--------------------------------|--|
| <b>Membership Organization</b> | <p>Click a link to access the Membership Detail page for the organization.</p> <hr/> <p><b>Note:</b> If business unit security is active, the system only displays member organizations for accessible business units.</p> <hr/> |

## 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:

| <b>Data Region</b>     | <b>Profile View</b>                   |
|------------------------|---------------------------------------|
| Assigned Resources     | Prospect Management                   |
| Clearances             | Prospect Management                   |
| Strategies             | Prospect Management                   |
| 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 | <ul style="list-style-type: none"> <li>Contributor Relations &gt; Constituent Information &gt; Organizations &gt; Organization Profile &gt; Prospect Profile</li> <li>Contributor Relations &gt; Constituent Information &gt; Workset &gt; Workset Constituent Info &gt; Organization Profile &gt; Prospect Profile</li> <li>Contributor Relations &gt; Constituent Information &gt; People &gt; Person Profile &gt; Prospect Profile</li> <li>Self Service &gt; Outreach &gt; View Person Information &gt; Constituent Information &gt; Person Profile &gt; Prospect Profile</li> </ul> | 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.

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.

Organization Profile
Prospect Profile

### Prospect Profile

Organization Testing Corp

ID: AV5555

Constituent Type: Corporation

Institution: PSUNV

Profile View: Prospect Management

[Printer Friendly Version](#)
Expand All
Collapse All

Clearance Required

Prospect Manager: Mario Capozzelli

Overall Status:

Planned Giving Status:

## 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.

| <b>Field or Control</b>                                  | <b>Description</b>  |
|--|---|
| <b>Constituent Type</b>                                  | Click to access the Constituent Type Summary page for a person. It lists all types assigned to a constituent.   |
| <b>Year</b>  | <p>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.</p> <p>If no class year exists but the system has academic information for the prospect, then <b>None</b> appears here as a link. Click the link to access the Academic Information inquiry component.</p> |
| <b>FERPA (Family Educational Rights and Privacy Act)</b> | Click to access the FERPA display component for the person. It lists the prospect's personal data and specifies which information can be released.  |
| <b>Profile View</b>                                      | Select a profile view— <i>Prospect Management</i> or <i>Philanthropic Interests</i> —to expand it and populate its data regions. Click the arrow next to the region's name to manually expand or collapse data regions.   |
| <b>Printer Friendly Version</b>                          | <p>Click to access a read-only version of the page that expands all rows of all populated data regions. You can print this page using your browser's print functionality.</p> <hr/> <p><b>Note:</b> Set narrow print margins for your printer.</p> <hr/> <p>Click the <i>Return</i> button to return to the Prospect Profile page.</p>  |
| <b>Expand All and Collapse All</b>                       | Click to either expand or collapse all data regions below.  |
| <b>Clearance Required</b>                                | If this check box is selected, clearance is required before contacting the prospect. You set clearances on the Clearance page.  |

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Prospect Manager</b> | <p>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.</p> <p>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.</p> |

### Additional Information

The system displays messages at the bottom of the page based on the following conditions:

---

**Note:** Where no data exists, the system hides the data region.

---

| <b>Data Region</b>     | <b>Condition</b>      | <b>Message</b>   |
|------------------------|-----------------------|--|
| 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                                     |

| <b>Data Region</b> | <b>Condition</b> | <b>Message</b>                        |
|--------------------|------------------|---------------------------------------|
| 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" (Campus Community Fundamentals)

**Viewing Prospect Management Details**

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

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.

| <b>Assigned Resources</b> |                   |   |               |  |
|---------------------------|-------------------|---|---------------|--|
| Type                      | Resource Name     | Role  | Campaign      |  |
| Staff                     | Capozzelli, Mario | <a href="#">Prospect Manager</a>            | Campaign 2000 |  |
| Unit                      | Annual Giving     | <a href="#">Acknowledgement Coordinator</a> |               |  |

| <b>Clearances</b> |               |               |            |          |                        |
|-------------------|---------------|---------------|------------|----------|------------------------|
| Intv Type         | Description   | Strategy Name | Start Date | End Date | Detail                 |
| CAMPAIGN          | Campaign 2000 |               | 09/01/2000 |          | <a href="#">Detail</a> |

| <b>Strategies</b>                      |                       |
|--|-----------------------|
| Strategy Name                          | Last Update Timestamp |
| <a href="#">Org Testing Strategy 1</a> | 09/10/2006 9:14PM     |
| <a href="#">Org Testing Strategy 2</a> | 09/10/2006 9:14PM     |

| <b>Recent Actions</b> |               |  |              |          |          |
|-----------------------|---------------|--|--------------|----------|----------|
| Planned Date          | Complete Date | Action Description                                 | Contact Type | Status   | Result   |
| 09/10/2000            | 09/10/2006    | <a href="#">Invite to sponsor Dean's Symposium</a> | Letter       | Complete | Accepted |

| <b>Next Actions</b> |   |              |           |
|---------------------|---|--------------|-----------|
| Planned Date        | Action Description                      | Contact Type | Status    |
| 09/10/2006          | <a href="#">Ask for Leadership Gift</a> | Visit        | Scheduled |
| 10/10/2006          | <a href="#">Follow-up visit</a>         | Visit        | Scheduled |

| <b>Ratings</b>                   |             |                  |             |                |
|----------------------------------|-------------|------------------|-------------|----------------|
| Rating Category                  | Rating Type | Rating Indicator | Rating Date | Potential Date |
| <a href="#">Giving Potential</a> | Staff       | 10,001-25,000    | 09/10/2004  |                |
| <a href="#">Giving Potential</a> | Staff       | 50,000-100,000   | 09/10/2006  |                |

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:

| <b>Information Section</b> | <b>Page</b>          |
|----------------------------|----------------------|
| Assigned Resources         | Prospect Assignments |

| <b>Information Section</b> | <b>Page</b>      |
|----------------------------|------------------|
| 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.

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Role</b>             | Click to access the Assignment Detail page.  |
| <b>Spouse</b>           | If this check box is selected, the prospect and spouse are linked and the same resources are assigned to them.<br><br>This check box appears only for prospects that are people. |

## Clearances

| <b>Field or Control</b> | <b>Description</b>                                       |
|-------------------------|--|
| <b>Detail</b>           | Click to access the Clearance page to view more details. |

## Strategies

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Strategy Name</b>    | Click to access the Prospect Strategy Detail page.                                  |
| <b>Spouse Link</b>      | If this check box is selected, a linked strategy exists for a spouse in the system. |

| <i>Field or Control</i> | <i>Description</i>                                |
|-------------------------|---|
| <b>Linked Actions</b>   | Click to access the Strategy Linked Actions page. |

## Recent Actions

This group box displays actions completed within the last year.

| <i>Field or Control</i>   | <i>Description</i>                      |
|---------------------------|---|
| <b>Action Description</b> | 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.

| <i>Field or Control</i>   | <i>Description</i>                      |
|---------------------------|---|
| <b>Action Description</b> | Click to access the Action Detail page. |

## Ratings

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Rating Category</b>  | Click to access the Ratings Detail page to view more ratings information. |

## Personal Assets

This group box appears only for prospects that are people.

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Description</b>      | 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.

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 |                              |            |          |        |
|------------------------|------------------------------|------------|----------|--------|
| Type                   | Involvement                  | Start Date | End Date | Source |
| Award/Honor            | United Way                   |            |          |        |
| Interest               | College of Bus. Coop Program | 09/04/2006 |          |        |

| Designations Supported |  |                |                     |               |                |       |  |
|------------------------|--|----------------|---------------------|---------------|----------------|-------|--|
| Des BU                 | Designation Name                           | Giving Credits | Recognition Credits | 1st Gift Date | Last Gift Date | Count |  |
| PSUNV                  | <a href="#">Business Dean's Fund</a>       | 13,060.00 USD  | 0.00 USD            | 09/10/2001    | 09/10/2006     | 5     |  |
| PSUNV                  | <a href="#">Capital Campaign 2000 Fund</a> | 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.

| Field or Control | Description   |
|------------------|---|
| Designation Name | Click to access the Account Details page for the designation. |

### Planned Gifts

This group box appears only for prospects that are people.

| <i>Field or Control</i>  | <i>Description</i>  |
|--------------------------|---|
| <b>Planned Gift Name</b> | 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](#)

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## 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

| <i>Page Name</i> | <i>Definition Name</i>             | <i>Navigation</i>   | <i>Usage</i>   |
|------------------|------------------------------------|---|--|
| Audience History | AV_AUD_HISTORY<br>AV_AUD_HISTORY_E | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Constituent Information &gt; People &gt; Participation &gt; Audience History</b></li> <li>• <b>Contributor Relations &gt; Constituent Information &gt; Organizations &gt; Participation &gt; Audience History</b></li> </ul> | <p>Assess the ways in which a constituent is being solicited. This page displays all the target audiences to which the constituent belongs.</p> <p>Audiences are defined for both initiatives and membership organizations, and are based on a variety of attributes. For example, an audience might consist of all constituents who have an involvement of <i>GOLF</i>.</p> |

## Reviewing Audience History

Access the Audience History page (**Contributor Relations > Constituent Information > People > Participation > Audience History**).

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Audience</b>         | Lists the name of the initiative audience to which the constituent belongs.                                |
| <b>Audience Type</b>    | Indicates whether the audience is for the purpose of <i>Administration, Segmentation, or Reporting</i> .   |
| <b>Initiative</b>       | Lists the name of the initiative to which the audience is associated.                                      |
| <b>Initiative Type</b>  | Indicates whether the initiative is a campaign, volunteer effort, event, membership effort, or other type. |

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## 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

| <i>Page Name</i>   | <i>Definition Name</i>                              | <i>Navigation</i>   | <i>Usage</i>   |
|--------------------|---|---|--|
| Involvement        | AV_INVLV<br>AV_INVLV_E<br>AV_INVLV_W                | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Constituent Information &gt; People &gt; Biographic Information &gt; Involvement</b></li> <li>• <b>Contributor Relations &gt; Constituent Information &gt; Organizations &gt; Participation &gt; Involvement</b></li> <li>• <b>Contributor Relations &gt; Constituent Information &gt; Workset &gt; Involvement</b></li> </ul>   | Add new involvement records for a constituent.                                 |
| Involvement Filter | AV_INVLV_FLTR<br>AV_INVLV_FLTR_E<br>AV_INVLV_FLTR_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Constituent Information &gt; People &gt; View Person Information &gt; Participation &gt; Involvement Summary &gt; Involvement Filter</b></li> <li>• <b>Contributor Relations &gt; Constituent Information &gt; Organizations &gt; Participation &gt; Involvement Summary &gt; Involvement Filter</b></li> <li>• <b>Contributor Relations &gt; Constituent Information &gt; Workset &gt; Workset Constituent Info &gt; Involvement Summary &gt; Involvement Filter</b></li> </ul> | Filter the types of involvement that you view on the Involvement Summary page. |

| <b>Page Name</b>    | <b>Definition Name</b>                              | <b>Navigation</b>  | <b>Usage</b>   |
|---------------------|---|--|--|
| Involvement Summary | AV_INVLV_SMRY<br>AV_INVLV_SMRY_E<br>AV_INVLV_SMRY_W | <ul style="list-style-type: none"> <li>Click the <b>Search</b> button on the Involvement Filter page.</li> <li><b>Contributor Relations &gt; Constituent Information &gt; People &gt; Participation &gt; Involvement Summary &gt; Involvement Summary</b></li> <li><b>Contributor Relations &gt; Constituent Information &gt; Organizations &gt; Participation &gt; Involvement Summary</b></li> <li><b>Contributor Relations &gt; Constituent Information &gt; Workset &gt; Workset Constituent Info &gt; Involvement Summary &gt; Involvement Summary</b></li> </ul> | View a list of the involvement records that match the filter criteria that you specify on the Involvement Filter page.   |
| Involvement Detail  | AV_INVLV_DTL_SP                                     | <ul style="list-style-type: none"> <li>You can access the Involvement Detail page through multiple navigation paths. The most frequently used path follows:</li> <li>Click the <b>Detail</b> link on the Involvement Summary page.</li> </ul>  | View additional information about an involvement record.   |
| Roster Filter       | AV_I_INVLV_FLTR                                     | <b>Contributor Relations &gt; CR Reports &gt; Involvement Roster &gt; Roster Filter</b>  | 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                                     | <b>Contributor Relations &gt; CR Reports &gt; Involvement Roster &gt; Roster List</b>  | 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**).

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**

Shawn Gallegher ID: AV0001

Constituent Type: [Alumni](#) Year: 2001 PSUNV Prospect Manager: Mario Capozzelli

---

**Involvement** Find | View All | First 1 of 5 Last

|                              |   |            |     |
|------------------------------|---|------------|-----|
| <b>*Involvement Type</b>     | <input type="text" value="ACT"/>        | Activity   | + - |
| <b>*Involvement Category</b> | <input type="text" value="CHAR"/>       | Charitable |     |
| <b>*Involvement:</b>         | <input type="text" value="UNWAY"/>      | United Way |     |
| <b>Start Date:</b>           | <input type="text" value="06/01/1998"/> |            |     |
| <b>End Date:</b>             | <input type="text"/>                    |            |     |
| <b>Received Date:</b>        | <input type="text"/>                    |            |     |
| <b>Source Description:</b>   | <input type="text"/>                    |            |     |
| <b>Last Modified Date:</b>   | 07/26/1998                              |            |     |

| <i>Field or Control</i>     | <i>Description</i>   |
|-----------------------------|--|
| <b>Involvement Type</b>     | Select an involvement type, such as a constituent's interest, activities, awards, or affiliations. Its description appears to the right.   |
| <b>Involvement Category</b> | Select a category of involvement information such as professional, charitable, academic, social, religious, and so on. The category's description appears to the right.  |
| <b>Involvement</b>          | Select an involvement code from the available options, which are defined by your institution. The code's description appears to the right.   |
| <b>Institution</b>          | Indicate with which institution the involvement is associated.   |
| <b>Received Date</b>        | If the involvement type is <i>Award and Honor</i> or another type that requires a received date rather than a date range, enter the date in the <b>Rcvd Dt</b> field. Make this determination when defining involvement types. |
| <b>Source Description</b>   | The person or publication that alerted you to the constituent's involvement.   |
| <b>Last Modified Date</b>   | 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**).

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.

The screenshot shows the 'Involvement Filter' page for Shawn Gallegher (ID: AV0001). The page includes the following fields and controls:

- Constituent Type:** Alumni
- Year:** 2001
- PSUNV** (checkbox)
- Prospect Manager:** Mario Capozzelli
- \*Time Frame:** Current (dropdown menu)
- Institution:** (text input field with search icon)
- From Date:** (calendar icon)
- To Date:** (calendar icon)
- Search:** (yellow button)
- Involvement Type:** (dropdown menu with search icon, +, - buttons)
- Involvement Category:** (dropdown menu with search icon, +, - buttons)

| <i>Field or Control</i>     | <i>Description</i>   |
|-----------------------------|--|
| <b>Institution</b>          | Select the institution for which you want to view involvement information.   |
| <b>Involvement Type</b>     | Select the involvement types about which you want to view information on the Involvement Summary page.   |
| <b>Involvement Category</b> | Select the involvement categories about which you want to view information on the Involvement Summary page. Involvement categories describe the nature of the involvement. |
| <b>Search</b>               | 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**).

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.

|                               |                      |                          |                      |
|-------------------------------|----------------------|--------------------------|----------------------|
| <b>Roster Filter</b>          |                      | <b>Roster List</b>       |                      |
| <b>Institution:</b>           | PSUNV                | PeopleSoft University    |                      |
| <b>Involvement Type:</b>      | ACT                  | Activity                 |                      |
| <b>Involvement Category:</b>  | MUSIC                | Music                    | <b>Search</b>        |
| <b>Involvement Code:</b>      | BAND                 | Marching Band            |                      |
| <b>Person / Organization:</b> | Person               |                          |                      |
| <b>From Start Date:</b>       | <input type="text"/> | <b>To Start Date:</b>    | <input type="text"/> |
| <b>From End Date:</b>         | <input type="text"/> | <b>To End Date:</b>      | <input type="text"/> |
| <b>From Received Date:</b>    | <input type="text"/> | <b>To Received Date:</b> | <input type="text"/> |

| <i>Field or Control</i>     | <i>Description</i>  |
|-----------------------------|---|
| <b>Involvement Type</b>     | Select the involvement type for which you want to create a roster. Its description appears to the right.  |
| <b>Involvement Category</b> | Select the involvement category for which you want to create a roster. Involvement categories describe the nature of the involvement, such as <i>Professional</i> , <i>Political</i> , <i>Charitable</i> , and so on. The description of the category appears to the right. |
| <b>Involvement Code</b>     | Select the involvement code for which you want to create a roster. Involvement codes describe the specific involvement, such as <i>Golf</i> , <i>Hunting</i> , <i>Dancing</i> , <i>Kiwanis Club</i> , and so on. The description of the code appears to the right.          |
| <b>Search</b>               | Click to retrieve a list of involvement records that make up your roster on the Roster List page.<br><br><b>Note:</b> 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

| <i>Field or Control</i>                       | <i>Description</i>  |
|---|---|
| <b>Relationship Nbr</b> (relationship number) | The system automatically generates a relationship number when you establish and save a relationship.  |
| <b>Related ID</b>                             | 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.  |
| <b>Relationship</b>                           | 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. |
| <b>Source Description</b>                     | Enter the name of the person or publication that provides your institution with information about this relationship.  |

## Pages Used to Establish Relationships

| <i>Page Name</i>   | <i>Definition Name</i>                                   | <i>Navigation</i>   | <i>Usage</i>   |
|--|--|---|--|
| Relationships  | AV_RELATIONSHIPS_E                                       | <b>Contributor Relations</b> ><br><b>Constituent Information</b> ><br><b>Organizations</b> ><br><b>Relationships</b> > <b>Org to Org Relationships</b>  | Record information about a relationship between two organizations.   |
| Address Detail   | AV_ADDRESS_SP<br>AV_ADDRESS_2_SP                         | You can access the Address Detail page through multiple navigation paths. A frequently used path is:<br><br>Click the <b>Address</b> 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<br>(person to organization relationships) | AV_RELATION_PE   | <b>Contributor Relations</b> ><br><b>People</b> > <b>Relationships</b> ><br><b>Person to Org Relationships</b>  | 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<br>(organization to person relationships) | AV_RELATION_EP   | <b>Contributor Relations</b> ><br><b>Constituent Information</b> ><br><b>Organizations</b> ><br><b>Relationships</b> > <b>Org to Person Relationships</b>   | 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<br>AV_CNST_RELATION_W                   | <b>Contributor Relations</b> ><br><b>Constituent Information</b> ><br><b>Workset</b> > <b>Workset Constituent Info</b> ><br><b>Relationships - Workset</b> ><br><b>Relationship Summary - Workset</b> | View information about the relationships that a person has with other people and organizations.  |
| Relationship Detail  | AV_RELATE_E_SP<br>AV_RELATION_EP_SP<br>AV_RELATION_PE_SP | Click the <b>Details</b> 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 <b>Address</b> 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. |

| <i>Page Name</i>   | <i>Definition Name</i>               | <i>Navigation</i>   | <i>Usage</i>   |
|--|--------------------------------------|---|--|
| Org Relationship Summary (organization relationship summary) | AV_ORG_RELATION<br>AV_ORG_RELATION_W | <ul style="list-style-type: none"> <li>Contributor Relations &gt; Constituent Information &gt; Organizations &gt; Relationships &gt; Relationship Summary</li> <li>Contributor Relations &gt; Constituent Information &gt; Workset &gt; Workset Constituent Info &gt; Relationships - Workset &gt; Org Relationship Summary - WS</li> </ul> | 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" (Campus Community Fundamentals)

## Establishing an Organization-to-Organization Relationship

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

| <i>Field or Control</i>    | <i>Description</i>   |
|----------------------------|--|
| <b>Reciprocal Relation</b> | Select the corresponding relationship. For example, if an organization is a parent company, the reciprocal relation might be <i>Subsidiary</i> . You define reciprocal relations using the Reciprocal Relationship page. |
| <b>Description</b>         | 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.   |

| <b>Field or Control</b>   | <b>Description</b>   |
|---------------------------|--|
| <b>Formal Description</b> | <p>Click this link to enter the formal long name of the organization.</p> <hr/> <p><b>Note:</b> 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.</p> <hr/> |
| <b>Address</b>            | 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" (Campus Community Fundamentals)

## Establishing a Person-to-Organization Relationship

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

| <b>Field or Control</b>   | <b>Description</b>   |
|---------------------------|--|
| <b>Relationship</b>       | Enter the relationship that the person has with the organization. For example, if you are defining a trustee/foundation relationship, the person relationship is <i>Trustee or Officer</i> .   |
| <b>Description</b>        | Displays the name of the related organization.   |
| <b>Formal Description</b> | <p>Click this link to enter the formal long name of the organization.</p> <hr/> <p><b>Note:</b> 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.</p> <hr/> |

## Establishing an Organization-to-Person Relationship

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

| <b>Field or Control</b>             | <b>Description</b>  |
|-------------------------------------|---|
| <b>Relationship</b>                 | 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 <i>Trustee</i> . |
| <b>Related ID</b>                   | Select the name of the related person.  |
| <b>Prefix</b>                       | If you do not select an ID, select a name prefix. If you select an ID, the person's name prefix appears.  |
| <b>Suffix</b>                       | If you do not select an ID, select a name suffix. If you select an ID, the person's name suffix appears.  |
| <b>SSN (social security number)</b> | 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

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## 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.

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## 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

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Campaign</b>         | 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.   |
| <b>Role</b>             | <p>Select the role that the resource plays in the cultivation process. Roles are determined by your institution. Values include <i>PM</i> (Prospect Manager), <i>SOL</i> (Solicitor), and <i>CM</i> (Campaign Manager).</p> <p>The list of available role values for each assignment is affected by the selections you made in the <b>Assignment Role Option</b> group box on the CR Installation page.</p> <hr/> <p><b>Note:</b> Each prospect can have only one resource at a time assigned to the <i>PM</i> role.</p> |

### Pages Used to Create Resource Assignments

| <i>Page Name</i>  | <i>Definition Name</i>          | <i>Navigation</i>   | <i>Usage</i>                                  |
|-------------------|---------------------------------|---|---|
| Mass Assign Staff | AV_MASS_PRSN<br>AV_MASS_PRSN_WS | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Prospect Resources &gt; Mass Assignments &gt; Mass Staff Assignments</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Prospect Resources &gt; Mass Assignments &gt; Mass Assign Staff - Workset</b></li> </ul> | Assign groups of prospects to a staff member. |

| <b>Page Name</b>       | <b>Definition Name</b>                              | <b>Navigation</b>   | <b>Usage</b>                                   |
|------------------------|---|---|--|
| Mass Assign Units      | AV_MASS_UNIT<br>AV_MASS_UNIT_WS                     | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Prospect Resources &gt; Mass Assignments &gt; Mass Unit Assignments</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Prospect Resources &gt; Mass Assignments &gt; Mass Assign Unit - Workset</b></li> </ul>   | Assign groups of prospects to a unit.          |
| Mass Assign Volunteers | AV_MASS_VOL<br>AV_MASS_VOL_WS                       | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Prospect Resources &gt; Mass Assignments &gt; Mass Volunteer Assignments</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Prospect Resources &gt; Mass Assignments &gt; Mass Assign Volunteers - WS</b></li> </ul>   | Assign groups of prospects to a volunteer.     |
| Staff Assignment       | AV_STAFF_ASGN<br>AV_STAFF_ASGN_E<br>AV_STAFF_ASGN_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Prospect Resources &gt; Assign Prospect Resources &gt; Staff Assignment</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Prospect Resources &gt; Assign Prospect Resources Org &gt; Staff Assignment</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Prospect Resources &gt; Assign Resources - Workset &gt; Staff Assignment</b></li> </ul> | Assign individual prospects to a staff member. |

| <b>Page Name</b>     | <b>Definition Name</b>                           | <b>Navigation</b>   | <b>Usage</b>   |
|----------------------|--|---|--|
| Volunteer Assignment | AV_VOL_ASGN<br>AV_VOL_ASGN_E<br>AV_VOL_ASGN_W    | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Prospect Resources &gt; Assign Prospect Resources &gt; Volunteer Assignment</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Prospect Resources &gt; Assign Prospect Resources Org &gt; Volunteer Assignment</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Prospect Resources &gt; Assign Resources - Workset &gt; Volunteer Assignment</b></li> </ul> | Assign individual prospects to a volunteer.  |
| Unit Assignment      | AV_UNIT_ASGN<br>AV_UNIT_ASGN_E<br>AV_UNIT_ASGN_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Prospect Resources &gt; Assign Prospect Resources &gt; Unit Assignment</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Prospect Resources &gt; Assign Prospect Resources Org &gt; Unit Assignment</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Prospect Resources &gt; Assign Resources - Workset &gt; Unit Assignment</b></li> </ul>                | Assign individual prospects to a unit.   |
| Resource Filter      | AV_RSRC_ASGN_INQ                                 | <b>Contributor Relations &gt; Prospect Management &gt; Prospect Resources &gt; Resource Assignments &gt; Resource Filter</b>  | Select the individual resource, or type of resource, for which to view a list of assigned prospects. |

| <b>Page Name</b>     | <b>Definition Name</b>                                       | <b>Navigation</b>  | <b>Usage</b>  |
|----------------------|--|--|---|
| Resource Assignments | AV_RSRC_ASGN_INQ2  | <b>Contributor Relations</b> ><br><b>Prospect Management</b> ><br><b>Prospect Resources</b> ><br><b>Resource Assignments</b> ><br><b>Resource Assignments</b>  | View a list of the prospects who are assigned to the resource. Prospect assignments that meet the criteria that you selected on the Resource Filter page appear on this page.   |
| Assignment Detail    | AV_ASGN_INQ_DTL_SP   | <ul style="list-style-type: none"> <li>You can access the Assignment Detail page through multiple navigation paths. The most frequently used paths are:</li> <li>Click the <b>Detail</b> button on the Resource Assignments page.</li> <li>Click the <b>Detail</b> button on the Prospect Assignments page.</li> </ul>   | View additional information about an assignment.  |
| Prospect Assignments | AV_PRSP_ASGN_INQ<br>AV_PRSP_ASGN_INQ_E<br>AV_PRSP_ASGN_INQ_W | <ul style="list-style-type: none"> <li><b>Contributor Relations</b> &gt; <b>Prospect Management</b> &gt; <b>Prospect Resources</b> &gt; <b>Prospect Assignments</b></li> <li><b>Contributor Relations</b> &gt; <b>Prospect Management</b> &gt; <b>Prospect Resources</b> &gt; <b>Prospect Assignments - Org</b></li> <li><b>Contributor Relations</b> &gt; <b>Prospect Management</b> &gt; <b>Prospect Resources</b> &gt; <b>Prospect Assignments - Workset</b></li> </ul> | 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   | <b>Contributor Relations</b> ><br><b>CR Reports</b> > <b>Role Assignments</b>  | 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.

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" (Campus Self Service ).

| <b>Field or Control</b>                   | <b>Description</b>   |
|---|--|
| <b>Institution</b>                        | Select the institution associated with the resource that you are assigning.<br><br><b>Note:</b> If your security access limits you to one academic institution, this field does not appear.  |
| <b>Staff ID, Volunteer ID, or Unit ID</b> | 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.  |
| <b>Role</b>                               | 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.<br><br>If <i>Defined</i> was selected on the CR Installation page, only roles assigned to the selected ID appear here.<br><br>If <i>Class</i> was selected, only roles for the ID type selected (staff, volunteer, or unit) appear here.<br><br>If <i>All</i> was selected, all roles defined in the system appear, regardless of their ID or type. |

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Workset Code</b>     | 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

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>ID and Name</b>      | 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

| <i>Field or Control</i>   | <i>Description</i>  |
|---|---|
| <b>External Org ID (external organization ID) and Description</b> | 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

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>ID and Name</b>      | 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**).

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.

| <i>Field or Control</i>                | <i>Description</i>  |
|--|---|
| <b>Staff ID, Volunteer ID, or Unit</b> | 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.   |
| <b>Spouse Link</b>                     | <p>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.</p> <hr/> <p><b>Note:</b> If this check box is unavailable for entry, one of the following is true:</p> <ul style="list-style-type: none"> <li>• The prospect does not have a spousal relationship established in the system.</li> <li>• The prospect or the prospect's spouse is deceased.</li> </ul> <p>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.</p> |

## Creating Individual Volunteer Assignments

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

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.

| Staff Assignment  | Volunteer Assignment  | Unit Assignment   |
|---|---|---|
| Gallegher, Shawn  |   | ID: AV0001  |
| Constituent Type: <a href="#">Alumni</a>  |   | Year: 2001  |
|   |   | Institution: PSUNV  |
| <div style="text-align: right;">    </div> |   |   |
| <b>Assignments</b> <span style="float: right;">Find   View All   First ◀ 1 of 1 ▶ Last</span>   |   |   |
| Volunteer ID:   | <input type="text" value="AV0007"/>      | Whitney, Christopher <span style="float: right;">+ -</span> |
| <b>Roles</b> <span style="float: right;">Find   View All   First ◀ 1 of 1 ▶ Last</span>   |   |   |
| *Role:  | <input type="text" value="SEC"/>         | Secretary/Treasurer <span style="float: right;">+ -</span>  |
| Campaign:   | <input type="text" value="EDUCATION"/>   | College of Education Campaign                               |
| *Start Date:  | <input type="text" value="08/10/1998"/>  |   |
| End Date:   | <input type="text"/>                     |   |

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**).

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.

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### 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.

| <i>Field or Control</i>  | <i>Description</i>   |
|--------------------------|--|
| <b>Assigned Resource</b> | Select the type of resource to view assignments for. Values are <i>Staff</i> , <i>Volunteer</i> , and <i>Unit</i> .<br><br>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. |

| <b>Field or Control</b>                   | <b>Description</b>   |
|---|--|
| <b>Staff ID, Volunteer ID, or Unit ID</b> | Select the ID for the resource whose prospect assignments you want to view. The label for this field depends on your selection in the <b>Assigned Resource</b> 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. |
| <b>Search</b>                             | 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.<br><br><b>Note:</b> 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**).

| <b>Field or Control</b>  | <b>Description</b>   |
|--------------------------|--|
| <b>Assigned Prospect</b> | Displays the name of the donor prospect for which a resource assignment exists.  |
| <b>Assigned Resource</b> | Displays the name of the staff member, volunteer, or unit assigned to the prospect.                                    |
| <b>Role</b>              | Displays the function of the resource assigned, such as <i>Prospect Manager</i> or <i>Solicitor</i> .                  |
| <b>Active</b>            | Indicates that the resource assignment is currently active.  |
| <b>Details</b>           | 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**).

| <b>Field or Control</b>  | <b>Description</b>  |
|--------------------------|---|
| <b>Institution</b>       | Select the institution for which to generate a report. The report contains information about assignments only for the institution that you select.  |
| <b>Assigned Resource</b> | <p>Select the resource type for which to generate a list of assignments. You can select <i>Staff</i>, <i>Volunteer</i>, or <i>Unit</i>.</p> <p>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.</p>  |
| <b>Sort By</b>           | <p>Select the sort order for the list of resources that appears on the report. You can sort by <i>Count</i>, <i>ID</i>, or <i>Name</i>.</p> <p>If you select <b>Count</b>, the Role Assignments report orders the staff IDs by the highest number of assignments.</p> <p>If you select <b>ID</b>, the report lists the staff by their ID numbers.</p> <p>If you select <b>Name</b>, the report lists the staff in alphabetical order.</p> <hr/> <p><b>Note:</b> The values in the <b>Sort By</b> and <b>Sort Order</b> fields appear on the report, so you'll know how you chose to sort this information.</p> <hr/> <p>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.</p> |
| <b>Sort Order</b>        | <p>Specify whether to view the information on the report in <i>Ascending</i> or <i>Descending</i> order.</p> <p>Descending order means that the values in the <b>Sort By</b> field are sorted from highest value to lowest value. Ascending order means that the values are sorted from lowest value to highest value.</p>  |
| <b>Report Type</b>       | <p>Select the type of report to generate.</p> <p>Select <i>Summary</i> 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.</p> <p>Select <i>Detail</i> 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.</p>  |

## 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 | <b>Contributor Relations</b> ><br><b>Prospect Management</b> ><br><b>Prospect Resources</b> ><br><b>Prospect Resource Goals</b> | 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**).

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.

The screenshot shows the 'Prospect Resource Goals' page. At the top, there are fields for 'Institution' (PSUNV), 'Fiscal Year' (2012), 'Assignment Type' (Staff), and 'Responsible' (AV0007 Christopher Whittey). Below these is a 'Resource Goals' section with a table. The table has columns for 'Goal Type', 'Initiative Type', 'Initiative Code', 'Overall Status', 'Amount', 'Percent', 'Number', and 'Target End Date'. Three rows are visible: 'Avg Gift' with an amount of 1,500.00, 'Nbr Visits' with a number of 75, and 'Financial' with an amount of 25,000.00. The table also includes search, add, and delete icons for each row.

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.

| Field or Control       | Description  |
|------------------------|--|
| <b>Assignment Type</b> | Indicates whether the goal applies to a staff member, a volunteer, or a CR Unit. |
| <b>Fiscal Year</b>     | The fiscal year to which the goal applies.                                       |

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Responsible</b>      | Indicates the person or unit to which the goal pertains.   |
| <b>Start Date</b>       | Enter the date on which the efforts toward the goal begin.   |
| <b>End Date</b>         | Enter the date on which the efforts toward the goal end.<br><br><b>Note:</b> The start and end dates can reflect interim periods within a fiscal year. For example, goals might be set on a quarterly basis.   |
| <b>Goal Type</b>        | Select the type of goal as defined on the Goal Type Table. This is a required field for all rows entered in the grid.  |
| <b>Initiative Type</b>  | 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.   |
| <b>Initiative</b>       | Enter the specific initiative to which the goal applies. This field is required if an <b>Initiative Type</b> has been selected. Otherwise, it is optional.   |
| <b>Overall Status</b>   | 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. |
| <b>Amount</b>           | The financial amount of the goal. This field is required if the <b>Goal Type</b> has been set up as an Amount-based field.   |
| <b>Percent</b>          | The percent expected to meet the goal. This field is required if the <b>Goal Type</b> has been set up as a Percent-based field.  |
| <b>Number</b>           | The number expected to be reached to accomplish the goal. This field is required if the <b>Goal Type</b> has been set up as a Number-based field.  |
| <b>Target End Date</b>  | 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

| <i>Page Name</i> | <i>Definition Name</i>                                 | <i>Navigation</i>  | <i>Usage</i>                                      |
|------------------|--|--|---|
| Prospect Status  | AV_PRSP_STATUS<br>AV_PRSP_STATUS_E<br>AV_PRSP_STATUS_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Prospect Strategy &gt; Prospect Status - Person</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Prospect Strategy &gt; Prospect Status - Organization</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Prospect Strategy &gt; Prospect Status - Workset</b></li> </ul> | Create an overall prospect status for a prospect. |

| <b>Page Name</b>        | <b>Definition Name</b>                                       | <b>Navigation</b>  | <b>Usage</b>   |
|-------------------------|--|--|--|
| Prospect Status History | AV_PRSP_HIST<br>AV_PRSP_HIST_E<br>AV_PRSP_HIST_W             | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Prospect Strategy &gt; Prospect Status History - Pers</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Prospect Strategy &gt; Prospect Status - Org</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Prospect Strategy &gt; Prospect Status - Work</b></li> </ul>   | View the history of a prospect's overall status.       |
| Prospect Strategy       | AV_PRSP_STRATEGY<br>AV_PRSP_STRATEGY_E<br>AV_PRSP_STRATEGY_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Prospect Strategy &gt; Strategy - Person &gt; Prospect Strategy</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Prospect Strategy &gt; Strategy - Organization &gt; Prospect Strategy</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Prospect Strategy &gt; Strategy - Workset &gt; Prospect Strategy</b></li> </ul> | Create an overall cultivation strategy for a prospect. |

| <b>Page Name</b>         | <b>Definition Name</b>   | <b>Navigation</b>   | <b>Usage</b>   |
|--------------------------|--|---|--|
| Linked Actions           | AV_PRSP_STRAT_ACTN<br>AV_PRSP_STRAT_AC_E<br>AV_PRSP_STRAT_AC_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Prospect Strategy &gt; Strategy - Person &gt; Linked Actions</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Prospect Strategy &gt; Strategy - Organization &gt; Linked Actions</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Prospect Strategy &gt; Strategy - Workset &gt; Linked Actions</b></li> </ul> | View the actions that are linked to a prospect's overall strategy. |
| Strategy Summary         | AV_STRT_SMRY<br>AV_STRT_SMRY_E<br>AV_STRT_SMRY_W               | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Prospect Strategy &gt; Strategy Summary - Person</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Prospect Strategy &gt; Strategy Summary - Organization</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Prospect Strategy &gt; Strategy Summary - Workset</b></li> </ul>                                     | View a summary of the strategies for a prospect.                   |
| Prospect Strategy Detail | AV_PRSP_STRAT_SP   | Click the <b>Details</b> 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**).

| <i>Field or Control</i>                          | <i>Description</i>   |
|--|--|
| <b>Overall Status</b>                            | Select the status of cultivation in which the prospect is currently involved.<br><br>Delivered values include <i>Active, In Negotiation, Prospect, Suspect, and Ultimate Gift</i> . Values for this field are translate values. You can modify these translate values. |
| <b>Comment</b>                                   | Enter a note indicating related information about the prospect status assignment.  |
| <b>Last Update Date/Time and Last Updated By</b> | 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**).

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.

The screenshot shows the 'Prospect Strategy' page for Shawn Gallegher. At the top, there are tabs for 'Prospect Strategy' and 'Linked Actions'. The header includes the name 'Shawn Gallegher', constituent type 'Alumni', ID 'AV0001', year '2001', school 'PSUNV', and prospect manager 'Mario Capozzelli'. The overall status is 'Prospect'. Below this is a 'Strategy' section with a search bar, 'View All', and pagination. The 'Strategy Name' is 'Gallegher Strategy', 'Strategy Status' is a dropdown, and 'Last Updt' is '07/24/98 10:11AM'. The 'Description' field contains the text 'Involve as a board member and cultivate toward a major gift.'. Below the strategy section is a 'Strategy Initiative' section with 'Initiative Type' and 'Initiative' fields. At the bottom is an 'Attachments' table with columns for 'Attached File', 'View', and 'Add Attachment'. The table contains one row with a 'View' button and an 'Add Attachment' button.

| Field or Control      | Description  |
|-----------------------|--|
| <b>Overall Status</b> | Displays the status of cultivation in which the prospect is currently involved. Values include <i>Active</i> , <i>In Negotiation</i> , <i>Prospect</i> , <i>Suspect</i> , and <i>Ultimate Gift</i> . Values for this field are delivered with the system as translate values. You can modify these translate values.   |
| <b>Strategy Name</b>  | Enter a descriptive title for the strategy that you are creating.  |
| <b>Spouse Link</b>    | <p>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.</p> <p>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.</p> <hr/> <p><b>Note:</b> If a constituent does not have a spousal relationship in the system, this check box is unavailable for selection.</p> |

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Strategy Status</b>  | 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.   |
| <b>Add Action</b>       | Click to access the Actions component, where you can add actions that are related to the strategy that you have created.<br><br><b>Note:</b> You must save the prospect's strategy before this button becomes active. |
| <b>Description</b>      | Describe the strategy.  |
| <b>Initiative Type</b>  | Select the type of initiative to relate to the prospect strategy. This selection narrows the choices that appear when you select an initiative.   |
| <b>Initiative</b>       | 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**).

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.

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Add Action</b>       | Click to open the Prospect Actions page, where you can add additional actions related to the strategy. |
| <b>Details</b>          | 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

| <i>Field or Control</i>   | <i>Description</i>  |
|---|---|
|  | 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

| <i>Page Name</i>          | <i>Definition Name</i>                                    | <i>Navigation</i>  | <i>Usage</i>  |
|---------------------------|---|--|---|
| Narrative                 | AV_BIO_BIT_RPT2<br>AV_BIO_BIT_RPT2_E<br>AV_BIO_BIT_RPT2_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt;CR Reports, &gt;Biographic Reports &gt;Biographic Profile &gt;Narrative</b></li> <li>• <b>Contributor Relations &gt;CR Reports, &gt;Biographic Reports &gt;Biographic Profile – Org &gt;Narrative</b></li> <li>• <b>Contributor Relations &gt;CR Reports, &gt;Biographic Reports &gt;Biographic Profile – Workset &gt;Narrative</b></li> </ul> | Write a longer description about a prospect's involvement with the institution.   |
| Personal Assets           | AV_PRSN_ASSET<br>AV_PRSN_ASSET_W                          | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Prospect Research &gt; Personal Assets</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Prospect Research &gt; Personal Assets - Workset</b></li> </ul>   | Track information about the assets, such as securities, real estate, fine art, automobiles, heirlooms, and so on, that are owned by a prospect. The organizational records that are contained in a workset do not appear on this page because personal asset information pertains only to people. |
| Display In Other Currency | AV_CURRENCY_OTHER   | <ul style="list-style-type: none"> <li>• You can access the Display in Other Currency page through multiple navigation paths. One frequently used path is:</li> <li>• Click the <b>Display in Other Currency</b> button on the Personal Assets page.</li> </ul>  | View information about the exchange of a monetary value from one currency to another.   |

| <b>Page Name</b>       | <b>Definition Name</b>                                 | <b>Navigation</b>   | <b>Usage</b>   |
|------------------------|--|---|--|
| Personal Asset Summary | AV_PASSET_GRID<br>AV_PASSET_GRID_W                     | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Giving Capacity &gt; Personal Asset Summary</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Giving Capacity &gt; Personal Asset Summ - Workset</b></li> </ul>   | 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 <b>Detail</b> link on the Personal Asset Summary page.  | View information about a particular asset that is owned by a prospect.   |
| Ratings                | AV_PRSN_RATING<br>AV_PRSN_RATING_E<br>AV_PRSN_RATING_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Prospect Research &gt; Ratings</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Prospect Research &gt; Ratings - Org</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Prospect Research &gt; Ratings - Workset</b></li> </ul> | Track information about the ratings that your institution uses to qualify prospects.   |
| Ratings Filter         | AV_RATNG_FILTR_P                                       | <b>Contributor Relations &gt; Prospect Management &gt; Giving Capacity &gt; Rating Summary &gt; Ratings Filter</b>  | Search for ratings information that meets the criteria you select, such as household income, gift capacity, and so on, for a prospect. |

| <b>Page Name</b>        | <b>Definition Name</b>  | <b>Navigation</b>   | <b>Usage</b>   |
|-------------------------|---|---|--|
| Rating Summary          | AV_PRSN_RATE_SMRY<br>AV_PRSN_RATE_SMR_E<br>AV_PRSN_RATE_SMR_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Giving Capacity &gt; Rating Summary</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Prospect Research &gt; Rating Summary - Org</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Giving Capacity &gt; Rating Summary - Workset</b></li> </ul>                        | View information about the ratings that meet the criteria you selected on the Ratings Filter page. |
| Ratings Detail          | AV_PRSN_RATE_SP   | Click the <b>Details</b> link on the Ratings Summary page.  | View detailed information about a particular rating.   |
| Philanthropic Interests | AV_PHIL_PNL<br>AV_PHIL_E_PNL<br>AV_PHIL_E_PNL                 | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Giving Interests &gt; Philanthropic Interests</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Giving Interests &gt; Philanthropic Interests - Org</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Giving Interests &gt; Philanthropic Interests - WS</b></li> </ul> | 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**).

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.

**Personal Assets**

Shawn Gallegher ID: AV0001

Constituent Type: [Alumni](#) Year: 2001 PSUNV Prospect Manager: Mario Capozzelli

**Assets** Find | View All First 2 of 2 Last

**Asset Category:** REALES Real Estate

**\*Description:** 3 acre ranch

**Source Description:**

**Comment:** Horse property, 6 bedroom home sits on property adjacent to stables

**Asset Value** Find | View All First 1 of 1 Last

| *Value Date | *Asset Value | Currency Code |
|-------------|--------------|---------------|
| 07/24/1998  | 1,500,000.00 | USD           |

This page enables you to maintain specific asset information associated with a constituent.

### Assets

| <i>Field or Control</i>   | <i>Description</i>  |
|---------------------------|---|
| <b>Asset Category</b>     | Select the type of asset that you are entering. Define asset categories using the Asset Types page.             |
| <b>Description</b>        | Describe the asset.   |
| <b>Source Description</b> | Enter the name of the publication or person providing information about a prospect's asset to your institution. |
| <b>Comment</b>            | Enter notes about the asset.  |

## Asset Value

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Value Date</b>       | Enter the date on which the asset value was determined. The default is today's date.   |
| <b>Asset Value</b>      | 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. |
| <b>Currency Code</b>    | 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.

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**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.

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### Related Links

[Maintaining Personal Assets](#)

## Maintaining Ratings

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

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

### Ratings

Shawn Gallegher ID: AV0001

Constituent Type: [Alumni](#) Year: [2001](#) PSUNV **Prospect Manager:** Mario Capozzelli

Rating Nbr: 17

Ratings Find | View All First 1 of 1 Last

\*Effective Date:  Status:

\*Rating Category:  Peer Screening Review

\*Rating Type:  Peer

\*Indicator:  Lifestyle-01B

Valid:  Upper Income Household

\*Rating Date:  Potential Date:

From Amount:

To Amount:

Initiative Code:

Source:

Comment:

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Rating Category</b>  | Select the type of rating that you are entering. Rating categories are defined on the Rating Categories page.   |
| <b>Rating Type</b>      | Indicate the type of source that provided the rating information to your institution. Rating types are defined on the Rating Types page.  |
| <b>Indicator</b>        | 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 <b>Value</b> field appears. |
| <b>Valid</b>            | Select a value that refines the indicator code to a more specific rating if the rating indicator requires it.   |
| <b>Rating Date</b>      | Enter the date on which rating information is provided. The default is today's date.  |
| <b>Potential Date</b>   | Enter the date on which a prospect may be qualified to give to your institution at a specified level.   |

| <b>Field or Control</b>   | <b>Description</b>  |
|---|---|
| <b>From Amount and To Amount</b>  | 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 <i>to amount</i> is not required.<br><br>The monetary values in the <b>From Amount</b> and <b>To Amount</b> fields appear here in base currency if you entered them in a currency other than your institution's base currency. |
| <b>Initiative Code</b>  | 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.  |
| <b>Source</b>   | 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**).

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.

| <b>Field or Control</b>               | <b>Description</b>   |
|---------------------------------------|--|
| <b>Rating Type</b>                    | This field returns the value <i>All</i> or any ratings types that occur on a rating for this prospect. Examples of rating types are <i>Peer</i> , <i>Staff</i> , and <i>Vendor</i> .   |
| <b>Rating Indicators</b>              | If you select <i>Specific</i> , the fields in the <b>Indicators</b> region appear, allowing you to select ratings indicators for the filter. If you select <i>All</i> , the region is hidden and all ratings indicators appear in the results.   |
| <b>Rating Category</b>                | Rating categories that apply to this constituent may be used as filter criteria. Examples of rating categories include charitable, academic, or survey.  |
| <b>Indicators</b>                     | 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. |
| <b>Rating Date and Potential Date</b> | Enter dates to narrow the search results that the system retrieves.  |
| <b>Amount</b>                         | Enter values in the <b>From</b> and <b>To</b> fields to narrow the search results that the system retrieves.   |
| <b>Ratings Source</b>                 | Enter values in the <i>Begins With</i> , <i>Contains</i> , <i>Ends With</i> , or <i>Exact Match</i> fields to search for ratings source information.   |
| <b>Current, Historical, and All</b>   | The system retrieves results that meet the effective date criteria you select.<br><br><i>Current</i> : Only current effective-dated rows appear.<br><br><i>Historical</i> : Only rows with an effective date less than today appear.<br><br><i>All</i> : All rows, regardless of date, appear.                           |
| <b>Search</b>                         | 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](#)

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## **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

| <b>Page Name</b> | <b>Definition Name</b>           | <b>Navigation</b>   | <b>Usage</b>  |
|------------------|----------------------------------|---|---|
| Clearance        | AV_CLEARANCE_P<br>AV_CLEARANCE_E | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Clearances &gt; Clearance</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Clearances &gt; Clearance - Organization</b></li> </ul> | Approve a prospect for cultivation related to an initiative or prospect strategy. |

| <b>Page Name</b>       | <b>Definition Name</b>           | <b>Navigation</b>   | <b>Usage</b>  |
|------------------------|----------------------------------|---|---|
| Mass Actions           | AV_MASS_ACTN                     | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Constituent Actions &gt; Mass Actions</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Constituent Actions &gt; Mass Actions - Workset</b></li> </ul>                                      | Create an action for multiple prospects at one time.  |
| Mass Action Completion | AV_MASS_ACTN_CMPSP               | Click the <b>Complete action</b> link on the Mass Actions page.   | Complete a mass action.   |
| Prospect Action        | AV_CNST_ACTN<br>AV_CNST_ACTN_E   | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Constituent Actions &gt; Actions - Person &gt; Prospect Action</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Constituent Actions &gt; Actions - Org &gt; Prospect Action</b></li> </ul> | Enter information about the action that you are creating.   |
| Action Results         | AV_CNST_ACTN2<br>AV_CNST_ACTN2_E | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Constituent Actions &gt; Actions - Person &gt; Action Results</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Constituent Actions &gt; Actions - Org &gt; Action Results</b></li> </ul>   | Complete an action and record its results, including a contact report or a report detailing the results of a particular action. |

| <b>Page Name</b>           | <b>Definition Name</b>                                       | <b>Navigation</b>  | <b>Usage</b>  |
|----------------------------|--|--|---|
| Donor Appreciation         | AV_DONR_APPR<br>AV_DONR_APPR_E<br>AV_DONR_APPR_W             | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Donor Appreciation &gt; Donor Appreciation</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Donor Appreciation &gt; Donor Appreciation - Org</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Donor Appreciation &gt; Donor Appreciation - Workset</b></li> </ul>              | Maintain information about the gifts that you bestow on prospects throughout the cultivation process.   |
| Donor Appreciation Summary | AV_DONR_APPR_INQ<br>AV_DONR_APPR_INQ_E<br>AV_DONR_APPR_INQ_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Donor Appreciation &gt; Donor Appreciation Summary</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Donor Appreciation &gt; Donor Appreciation Summ - Org</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Donor Appreciation &gt; Donor Appreciation Summ - WS</b></li> </ul> | 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 <b>Details</b> link on the Donor Appreciation Summary page.  | View additional information about a specific token of appreciation.   |
| Clearance                  | AV_CLEARANCE_P_INQ<br>AV_CLEARANCE_E_INQ                     | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Clearances &gt; View Clearances</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Clearances &gt; View Clearance - Organization</b></li> </ul>   | 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. |

| <b>Page Name</b> | <b>Definition Name</b>                           | <b>Navigation</b>   | <b>Usage</b>   |
|------------------|--|---|--|
| Action Filter    | AV_ACTN_FLTR<br>AV_ACTN_FLTR_E<br>AV_ACTN_FLTR_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Constituent Actions &gt; Action Summary - Person &gt; Action Filter</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Constituent Actions &gt; Action Summary - Org &gt; Action Filter</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Constituent Actions &gt; Action Summary - Workset &gt; Action Filter</b></li> </ul> | Search for specific actions pertinent to the constituent in context based on selection criteria. |
| Action List      | AV_CNST_ACTN_LIST                                | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Constituent Actions &gt; Action List - Person</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Constituent Actions &gt; Action List - Organization</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Constituent Actions &gt; Action List - Worklist</b></li> </ul>   | Add, edit, and delete constituent actions, regardless of their status.                           |

| <b>Page Name</b>           | <b>Definition Name</b>                               | <b>Navigation</b>  | <b>Usage</b>  |
|----------------------------|--|--|---|
| Action Summary             | AV_ACTN_SMRY<br>AV_ACTN_SMRY_E<br>AV_ACTN_SMRY_W     | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Constituent Actions &gt; Action Summary - Person &gt; Action Summary</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Constituent Actions &gt; Action Summary - Org &gt; Action Summary</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Constituent Actions &gt; Action Summary - Workset &gt; Action Summary</b></li> </ul> | View lists of actions for a prospect.                         |
| Action Detail              | AV_ACTN_DTL_SP<br>AV_ACTN_DTL2_SP<br>AV_ACTN_DTL3_SP | <ul style="list-style-type: none"> <li>• You can access the Action Detail page through multiple navigation paths. This one is used frequently:</li> <li>• Select an <b>Action</b> link on the Action Summary page.</li> </ul>  | View additional information about an action.                  |
| Ask Detail                 | AV_ACTN_ASK_SP                                       | Click the <b>Ask Information</b> button on the Action Detail page.   | View specific details about the ask.                          |
| Resource Assignment Detail | AV_ACTN_ASGN_SP                                      | Click the <b>Resource Assignments</b> button on the Action Detail page.  | View information about the resources assigned to this action. |
| Initiative Detail          | AV_ACTN_INTV_SP                                      | Click the <b>Initiatives</b> button on the Action Detail page.   | View information about the initiatives linked to this action. |

| <b>Page Name</b>  | <b>Definition Name</b>                                       | <b>Navigation</b>  | <b>Usage</b>  |
|---|--|--|---|
| Contact Report Summary  | AV_CNTC_RPT_SMRY<br>AV_CNTC_RPT_SMRY_E<br>AV_CNTC_RPT_SMRY_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Constituent Actions &gt; Contact Reports - Person</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Constituent Actions &gt; Contact Reports - Organization</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Stewardship Plans &gt; Constituent Actions &gt; Contact Report Summ - Workset</b></li> </ul> | 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<br>AV_CNTC_RPT2_SP                            | Click the <b>Contact Report</b> 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<br>AV_TODO_LIST_UNT                             | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; To Do Lists &gt; To Do List - Staff or To Do List - Volunteer or To Do List - Unit</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Initiative Actions &gt; To Do List - Staff or To Do List - Volunteer or To Do List - Unit</b></li> </ul>  | 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**).

| <b>Field or Control</b>            | <b>Description</b>   |
|------------------------------------|--|
| <b>Clearance Required</b>          | Select to indicate that the constituent must be cleared before he or she can be selected as a volunteer or prospect for an initiative.                               |
| <b>Prospect Manager</b>            | Displays the name of the person who is responsible for managing the institution contacts with this prospect. Contact this person if clearance is required.           |
| <b>Intv Type (initiative type)</b> | If clearance is approved, enter the initiative type for which clearance is requested. Initiative types are <i>Campaign, Volunteer, Membership, Event, and Other.</i> |
| <b>Initiative</b>                  | Enter the initiative for which clearance is approved. This field displays the initiatives that match the initiative type that you selected.                          |
| <b>Course of Action</b>            | Enter a description (up to 30 characters) of the course of action that you plan to take with the constituent.  |
| <b>Strategy</b>                    | 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**).

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.

### Mass Actions

**\*Institution:**  PeopleSoft University

**\*Action:**

**Description:**

**\*Planned Date:**  **Expiration Date**

**\*Action Type:**  Invitation **Contact Type:**

**\*Ask From:**  USD **Ask To:**  USD

**\*Status:**  [Complete action](#)

**Solicitor:**  **\*Solicitor ID:**

**Assignment Type:**  **Responsible:**  Jones,Rebekah

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.

| Others Assigned |                 |                   |                | Customize | Find | View All | First | 1 of 1 | Last |
|-----------------|-----------------|-------------------|----------------|-----------|------|----------|-------|--------|------|
|                 | Assignment Type | Resource Assigned |                | Role      |      |          |       |        |      |
| 1               | Staff           | AV0024            | Perkins, Darla | CM        |      |          |       |        |      |

| Initiatives |                 |                 |                         | Customize | Find | View All | First | 1 of 1 | Last |
|-------------|-----------------|-----------------|-------------------------|-----------|------|----------|-------|--------|------|
|             | Initiative Type | Initiative Code |                         |           |      |          |       |        |      |
| 1           | EVENT           | 50YRBANQ        | 50 Year Reunion Banquet |           |      |          |       |        |      |

| Persons Assigned to Action |       |                  |  | Customize | Find | View All | First | 1 of 1 | Last |
|----------------------------|-------|------------------|--|-----------|------|----------|-------|--------|------|
|                            | EmpID | Name             |  |           |      |          |       |        |      |
| 1                          | 0012  | Forbes, Syndi B. |  |           |      |          |       |        |      |

| Organizations Assigned to Action |                 |             |  | Customize | Find | View All | First | 1 of 1 | Last |
|----------------------------------|-----------------|-------------|--|-----------|------|----------|-------|--------|------|
|                                  | External Org ID | Description |  |           |      |          |       |        |      |
| 1                                | AV1070          | Ryan Agency |  |           |      |          |       |        |      |

**Process Actions**

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.

| <b>Field or Control</b>    | <b>Description</b>  |
|----------------------------|---|
| <b>Institution</b>         | Enter an institution.<br><br><b>Note:</b> If your security access limits you to one academic institution, this field does not appear. |
| <b>Action</b>              | Enter a descriptive title (up to 100 characters) for the action.  |
| <b>Description</b>         | Enter a description for the action.   |
| <b>Planned Date</b>        | Enter the date when the action is planned to occur. The default is today's date.  |
| <b>Expiration Date</b>     | Enter the date after which the action is considered to be expired.  |
| <b>Action Type</b>         | Select a classification for the action. Action types are defined on the Action Types page.  |
| <b>Contact Type</b>        | Enter the method of contact for the action.   |
| <b>Ask From and Ask To</b> | If the action type that you selected is <i>Ask</i> , you are required to enter an amount in the <b>Ask From</b> field.                |

| <b>Field or Control</b>           | <b>Description</b>  |
|-----------------------------------|---|
| <b>Status</b>                     | Select the overall state of an action at a particular time. Action status codes are defined on the Action Status page.  |
| <b>Complete action</b>            | Click this link to access the Mass Action Completion page, where you can create and complete actions at one time.   |
| <b>Solicitor and Solicitor ID</b> | If the action type you selected is <i>Ask</i> , 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.   |
| <b>Responsible Person</b>         | 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

| <b>Field or Control</b>  | <b>Description</b>   |
|--------------------------|--|
| <b>Assignment Type</b>   | Select the resource type from the values <i>Staff</i> , <i>Unit</i> , and <i>Volunteer</i> that is being assigned to the action. The values in this field are delivered with the system as translate values.<br>Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.<br><br>The resource type you select determines the list of available options that appears in the <b>Resource Assigned</b> field. |
| <b>Resource Assigned</b> | 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.   |
| <b>Role</b>              | Specify a role for other resources assigned to a mass action.<br>When you select this role, the system populates the <b>Role</b> 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**).

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.

**Prospect Action**
Action Results

Shawn Gallegher
ID: AV0001

**Constituent Type:** Alumni
**Year:** 2001 PSUNV
**Prospect Manager:** Mario Capozzelli

**Action Number:** 3
**\*Status:**  Pending

**\*Action:**

**Description:**

**Strategy:**  Gallagher Strategy

**Planned Date:**

**Action Type:**  Invitation

**Contact Type:**  Letter

**Assignment Type:**

**Complete Date:**

**Expiration Date:**

**Prospect Manager:** Mario Capozzelli

**Responsible:**  Mario Capozzelli

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.

**Others Assigned** Customize | Find | View All | First 1 of 1 Last

| Type  | Resource Assigned    | Role | Description         |
|-------|----------------------|------|---------------------|
| Staff | AV0023 Gilbert, Anne | GE   | Gift Entry Operator |

**Initiatives** Customize | Find | View All | First 1 of 1 Last

| Initiative Type      | Initiative Code      |
|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> |

**Ask Information**

Type:

Solicitor:

Ask From:  USD      Ask To:  USD

**Attachments** Customize | Find | View All | First 1 of 1 Last

| Attached File | View | Add Attachment |
|---------------|------|----------------|
|               | View | Add Attachmen  |

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

| <b>Field or Control</b>                | <b>Description</b>   |
|--|--|
| <b>Prospect Manager</b>                | 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.  |
| <b>Status</b>                          | Select the overall state, such as <i>Scheduled</i> , <i>In Process</i> , or <i>Complete</i> , of an action at a particular time. Status values are defined on the Action Status page.  |
| <b>Action</b>                          | Enter a description (up to 100 characters) of the action.  |
| <b>Description</b>                     | Enter descriptive information (up to 254 characters) about the purpose and goal of the action.   |
| <b>Strategy</b>                        | Select a prospect strategy to associate with the action. Selecting a strategy ties this action to a particular prospect strategy.  |
| <b>Planned Date</b>                    | Enter the date on which the action is scheduled to occur. Today's date is the default.   |
| <b>Complete Date</b>                   | <p>If the action is complete, enter the completion date or the date on which the action occurred. Setting an action to <i>Complete</i> requires that you enter an action result code before the action can be saved.</p> <p>If the <b>Require Contact Report</b> 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.</p> |
| <b>Action Type</b>                     | Select the classification, such as <i>Ask</i> , <i>Dinner</i> , or <i>Phone Call</i> , for the action. Action types are defined on the Action Types page.  |
| <b>Expiration Date</b>                 | 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.  |
| <b>Contact Type</b>                    | Select the value that determines how the action is made, for example, by <i>Telephone Call</i> , <i>Letter</i> , <i>Email</i> , or <i>Personal Visit</i> . Contact types are defined on the Action Contact Type page.  |
| <b>Assignment Type and Responsible</b> | 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.

| <i>Field or Control</i>           | <i>Description</i>  |
|-----------------------------------|---|
| <b>Type and Resource Assigned</b> | Select the type of resource that is assigned to the action and enter the ID of the resource assigned.<br><br>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. |
| <b>Role</b>                       | Select the role or capacity of the resource that is assigned to the prospect for this action.   |

## Initiatives

| <i>Field or Control</i>                    | <i>Description</i>   |
|--|--|
| <b>Initiative Type and Initiative Code</b> | Enter the initiative type and the initiative code to relate to the action. |

## Ask Information

| <i>Field or Control</i>    | <i>Description</i>   |
|----------------------------|--|
| <b>Ask From and Ask To</b> | If the action type that you selected on the Prospect Action page is <i>Ask</i> , 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. |
| <b>Solicitor</b>           | If the action type that you selected on the Prospect Action page is <i>Ask</i> , 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**).

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.

Prospect Action
Action Results

Shawn Gallegher ID: AV0001

Constituent Type: [Alumni](#) Year: [2001](#) PSUNV Prospect Manager: Mario Capozzelli

Action: Invitation to alumni event

Action Number:  Action Type: INVIT Result Code:

Expected Commitment:  USD

▼ Action Commitments
Customize | Find | View All | 
First 1 of 1 Last

| Commitment Type | Gift/Pledge Number | Date | Transaction Type | Amount |  |
|-----------------|--------------------|------|------------------|--------|--|
|                 |                    |      |                  |        |  |

▼ Contact Report

Author ID:  Jones,Rebekah

Link Report
Customize | Find | View All | 
First 1 of 1 Last

| *ID Type             | *ID                  | Name |   |   |
|----------------------|----------------------|------|---|---|
| <input type="text"/> | <input type="text"/> |      | + | - |

Contact Report

Report Date:  Complete Date:  [Printer Friendly Version](#) Date/Time Stamp

Before you can access the fields on this page, you must change the status of the action to *Complete* on the Prospect Action page.

| <b>Field or Control</b>    | <b>Description</b>   |
|----------------------------|--|
| <b>Result Code</b>         | Select the result of the action from these values: <i>Gift</i> , <i>Pledge</i> , <i>Ask Again</i> , <i>Accepted</i> , and <i>Negotiate</i> . These codes are defined on the Action Results page.<br><hr/> <b>Note:</b> This field is required for a <i>Complete</i> action.  |
| <b>Expected Commitment</b> | 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.  |
| <b>Actual Commitment</b>   | 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.   |
| <b>Pledge Number</b>       | 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 <b>Commitment Amount</b> field. This amount is derived from the gift entry component in the system.<br><hr/> <b>Important!</b> 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.

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Gift Number</b>      | Enter the gift number for any gifts the prospect made that are associated with the action.<br><hr/> <b>Important!</b> The <b>Gift Amount</b> field displays the entire amount of the gift, regardless of recognition or soft credit allocations. In the <b>Gift Nbr</b> field, you can retrieve information about all gifts that were given and recorded in the past 60 days. |

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Detail</b>           | 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. |
| <b>Author ID</b>        | Enter the name of the contact report author. This field populates by default to your user ID.   |
| <b>Report Date</b>      | Enter the date on which the contact report is created. This field populates by default to today's date.   |
| <b>Report</b>           | 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

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>ID Type</b>          | Select ID types of any additional prospects to link to this contact report.  |
| <b>ID</b>               | 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 <b>Linked Reports</b> group box on the Contact Report Summary page for that prospect. |
| <b>Link</b>             | Click this button to link the contact report to the prospect's spouse. The system adds a record in the <b>Link Report</b> 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

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Business Unit</b>    | 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.                 |
| <b>Item</b>             | Describe the item that you're giving to the prospect.<br>Appreciation items are defined on the Appreciation Items page. Donor appreciation gifts might include items such as pens, artwork, and books. |
| <b>Date Given</b>       | Enter the date on which you gave the appreciation item. The default is today's date.   |

### Given By

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Type</b>             | Select the type of resource— <i>Staff</i> , <i>Volunteer</i> , or <i>Unit</i> —that is giving the gift.<br><br>The values in this field are delivered with the system as translate values. Do not modify these values in any way.<br>Any modifications to these values will require a substantial programming effort.<br><br>The resource type that you select determines which choices are available in the <b>Resource</b> field. |
| <b>Resource</b>         | Enter the ID of the resource that is giving the gift.   |
| <b>Comments</b>         | 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**).

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.

Action Summary
Action Filter

Shaqua Johnson ID: AV0020

Constituent Type: [Alumni](#) Year: [1977](#) PSUNV Prospect Manager: Alan Franken

Action Type:   Invitation

Action Status:   Scheduled

Contact Type:   Letter

Responsible Person:

Solicitor:   Solicitor ID:

Item

|                         |                      |                                  |                       |                      |
|-------------------------|----------------------|----------------------------------|-----------------------|----------------------|
| Ask Amount From:        | <input type="text"/> | USD                              | Ask Amount To:        | <input type="text"/> |
| Commitment Amount From: | <input type="text"/> |                                  | Commitment Amount To: | <input type="text"/> |
| Planned Date From:      | <input type="text"/> | <input type="button" value="📅"/> | Planned Date To:      | <input type="text"/> |
| Complete Date From:     | <input type="text"/> | <input type="button" value="📅"/> | Complete Date To:     | <input type="text"/> |

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.

| <i><b>Field or Control</b></i> | <i><b>Description</b></i>   |
|--------------------------------|---|
| <b>Action Type Code</b>        | Enter an action type code. The action type is a classification for the action. Values include <i>ASK</i> , <i>INVIT</i> (invitation), and <i>Phone Call</i> . |
| <b>Action Status</b>           | Enter an action status for the overall state of an action. Values are <i>Scheduled</i> , <i>In Process</i> , or <i>Complete</i> .                             |
| <b>Responsible Person</b>      | Enter the person who is overseeing the action to see only actions involving this resource.  |

| <b>Field or Control</b>           | <b>Description</b>   |
|-----------------------------------|--|
| <b>Solicitor and Solicitor ID</b> | <p>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.</p> <hr/> <p><b>Important!</b> Solicitors apply only to actions with the type <i>Ask</i>. If you select a solicitor, the <b>Action Type Code</b> field changes to <i>Ask</i>.</p> <hr/> |
| <b>Search</b>                     | 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

| <b>Field or Control</b>                                | <b>Description</b>   |
|--|--|
| <b>Ask Amount From and Ask Amount To</b>               | <p>Enter a range for the ask amount. The <b>Ask Amount From</b> field contains the lowest amount in the range of actions to view; and the <b>Ask Amount To</b> field contains the highest amount. Ask amounts apply only to actions with the type <i>Ask</i>. If you enter an ask amount range, the value in the <b>Action Type Code</b> field changes to <i>Ask</i>.</p>  |
| <b>Commitment Amount From and Commitment Amount To</b> | <p>Enter a range for the commitment amount. The <b>Commitment Amount From</b> field contains the lowest amount in the range of actions to view, and the <b>Commitment Amount To</b> field contains the highest amount. Commitment amounts apply only to actions that have the type <i>Ask</i>. If you enter a commitment amount range, the value in the <b>Action Type Code</b> field changes to <i>Ask</i>.</p> <p>This filter value returns only actions that have commitment information on the Results page and that fall into the range that you entered.</p> |
| <b>Planned Date From and Planned Date To</b>           | Enter a planned from and to date range. The planned date is the date on which the action is tentatively scheduled to occur.  |
| <b>Complete Date From and Complete Date To</b>         | Enter a complete from and to date range. The complete date is the date on which the action is actually complete.   |



| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Delete</b>           | 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. |
| <b>Add an Action</b>    | 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.

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).

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.

**Action Detail**

**Shaqua Johnson** ID: AV0020 [Edit Action](#)

---

**Action Information**

|                            |                            |                          |              |
|----------------------------|----------------------------|--------------------------|--------------|
| <b>Action:</b>             | Invite to Dean's Symposium |                          |              |
| <b>Action Number:</b>      | 63                         | <b>Action Status:</b>    | Scheduled    |
| <b>Action Type:</b>        | Invitation                 | <b>Contact Type:</b>     | Letter       |
| <b>Planned Date:</b>       | 11/20/1998                 | <b>Complete Date:</b>    |              |
| <b>Strategy:</b>           |                            | <b>Result:</b>           |              |
| <b>Responsible Person:</b> | 10001                      | <b>Prospect Manager:</b> | Franken,Alan |

---

**Others Assigned** [Customize](#) | [Find](#) | [Grid](#) | First  1-2 of 2  Last

| Type      | Resource Assigned | Name          | Role             |
|-----------|-------------------|---------------|------------------|
| Unit      | ANNLGVG           | Annual Giving | Solicitor        |
| Volunteer | AV0010            | Kuney,Dara    | Committee Member |

---

**Initiatives**

**Attachments**

**Ask Information**

**Action Description**

**Contact Report**

|                     |            |               |
|---------------------|------------|---------------|
| <b>Author ID:</b>   | K0G001     | Jones,Rebekah |
| <b>Report Date:</b> | 12/17/2009 |               |

---

**Report Information**

**Linked Reports**

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

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Details</b>          | 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**).

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.

**To Do List - Staff**

\*Institution:  PeopleSoft University

Resource Assigned:  Capozzelli, Mario

Designee Type:

Contact Type:

\*Time Frame:  Date From:  Date To:

| To Do List Entry |                  |   |                 |                |               |            |
|------------------|------------------|---|-----------------|----------------|---------------|------------|
| Designee         | Action           | Action Type                                 | Contact Type    | Planned Date   | Complete Date |            |
| 1                | Gallegher, Shawn | <a href="#">Invitation to alumni event</a>  | Invitation      | Letter         | 07/24/1998    |            |
| 2                | Homecoming 1999  | <a href="#">Call about transportation</a>   | Phone           | Telephone Call | 12/01/1998    |            |
| 3                | Homecoming 1999  | <a href="#">Select Menu</a>                 | Hire contractor | Personal Visit | 01/01/1999    | 11/18/1998 |
| 4                | Homecoming 1999  | <a href="#">Arrange music for reception</a> | Phone           | Telephone Call | 10/01/1999    |            |
| 5                | Homecoming 1999  | <a href="#">Hold evaluation meeting</a>     | Visit           | Telephone Call | 10/31/1999    |            |

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.

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Institution</b>      | Enter a code for the institution name.<br><hr/> <b>Note:</b> If your security access limits you to one academic institution, this field does not appear. |

| <b>Field or Control</b>  | <b>Description</b>  |
|--------------------------|---|
| <b>Resource Assigned</b> | Enter the resource for which to view actions.   |
| <b>Designee Type</b>     | <p>Select the category of constituents or initiatives that is affected by the action. Values are <i>Constituents Only</i>, <i>Initiatives Only</i>, and <i>All</i>.</p> <p>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.</p> |
| <b>Refresh</b>           | Click to retrieve a new list of actions meeting the criteria that you selected earlier on this page.  |

## Chapter 10

# Managing Planned Giving Prospects

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## 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

| <b><i>Field or Control</i></b> | <b><i>Description</i></b>   |
|--------------------------------|---|
| <b>For</b>                     | Describe how the planned gift is to be distributed.   |
| <b>Business Unit</b>           | 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.<br><br>If you have already selected a designation, then change the business unit, and your selections are backed out. |
| <b>Designation</b>             | Select the designation to assign. Designations are funds at your institution to which donations can be allocated.   |

| <b>Field or Control</b>                             | <b>Description</b>   |
|---|--|
| <b>Type</b>   | <p>Select a type for the intended distribution. Values are:</p> <p><i>Interim</i>: The designation is a temporary holding site for the planned gift.</p> <p><i>Ultimate</i>: The gift remains in the designation that you select.</p> <p>Values for this field are delivered with the system as translate values. You can modify these translate values.</p> |
| <b>Amount</b>                                       | <p>Enter the amount to be distributed to the designation that you select.</p>  |
| <b>ID and Name</b>                                  | <p>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.</p>   |
| <b>Alliance</b>                                     | <p>Select the value that describes the contact's connection to the planned gift.</p> <p>Values for this field are delivered with the system as translate values. You can modify these translate values.</p>  |
| <b>Address</b>                                      | <p>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.</p>  |
| <b>Staff ID</b>                                     | <p>Select the staff ID of each staff member who is associated with the planned gift.</p>   |
| <b>Role</b>   | <p>Select the role of the assigned staff. Roles are determined by your institution and include values such as <i>Prospect Manager</i>, <i>Solicitor</i>, and <i>Campaign Manager</i>.</p>  |
| <b>Inst Est Value</b> (institution estimated value) | <p>Enter the expected value to your institution of the planned gift.</p>   |
| <b>Inst Actual Value</b>                            | <p>Enter the amount received by your institution.</p>  |
| <b>Irrevocable</b>                                  | <p>Select if the planned gift agreement cannot be revoked.</p>   |
| <b>Campaign</b>                                     | <p>Select the campaign associated with the planned gift.</p> <p>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.</p>   |
| <b>Comments</b>                                     | <p>Enter any additional comments about the planned gift.</p>   |

| <b>Field or Control</b>                               | <b>Description</b>   |
|---|--|
| <b>Date of Birth</b> 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. |
| <b>Estimated Value</b>                                | Enter the estimated value of the beneficiary's portion of the donor's planned gift.  |
| <b>Actual Value</b>                                   | Enter the beneficiary's or institution's payout.   |
| <b>Address</b>  | If the beneficiary does not have an ID in the system, click this link to enter address information for the beneficiary.  |
| <b>Item Type</b>                                      | 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.  |
| <b>Type</b>   | Select the type of account that is being used to manage the trust. Values are: <i>Asset</i> , <i>Liability</i> , and <i>Reserve</i> .<br><br>Values for this field are delivered with the system as translate values. You can modify these translate values.   |
| <b>Details</b>  | Click the link on any line to view more detailed information.  |

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## 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

| <i>Page Name</i>    | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|---------------------|------------------------|---|---|
| Bequest Detail      | AV_BEQUEST_DTL         | <b>Contributor Relations</b> ><br><b>Prospect Management</b> ><br><b>Planned Giving</b> ><br><b>Bequests</b> > <b>Bequest Detail</b>      | Enter information about a constituent's bequest to your institution.  |
| Bequest Detail 2    | AV_BEQUEST_DTL2        | <b>Contributor Relations</b> ><br><b>Prospect Management</b> ><br><b>Planned Giving</b> ><br><b>Bequests</b> > <b>Bequest Detail 2</b>    | Enter additional information about a constituent's bequest to your institution.   |
| Bequest Information | AV_BEQUEST_INFO        | <b>Contributor Relations</b> ><br><b>Prospect Management</b> ><br><b>Planned Giving</b> ><br><b>Bequests</b> > <b>Bequest Information</b> | 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**).

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.

The screenshot shows a software interface for 'Bequest Detail'. At the top, there are tabs for 'Bequest Detail', 'Bequest Detail 2', and 'Bequest Information'. Below the tabs, user information is displayed: 'Shawn Gallegher', 'ID: AV0001', 'Constituent Type: Alumni', 'Year: 2001', 'PSUNV', and 'Prospect Manager: Mario Capozzelli'. The main section is titled 'Bequest Detail' and contains several input fields:
 

- \*Bequest Name: Shawn Gallegher Bequest
- \*Bequest Date: 06/19/1998
- Est Maturity: 06/02/2048
- Est Estate: 5,000,000.00 USD
- Present Value: 2,500,000.00
- Campaign: CAMP2000
- \*Bequest Status: Advised - Verbal
- Status Dt: [empty]
- Act Maturity: [empty]
- Act Estate: [empty]

 Below this is a section for 'Benefit to Institution' with fields for 'Estimated Value' (2,000,000.00), 'Pct', and 'Actual Value'. At the bottom is a table for 'Other Beneficiaries' with columns for Beneficiary, Name, Estimated Value, Pct, and Actual Value. Two beneficiaries are listed: AV0004 (Holmgren, June) and AV0024 (Perkins, Darla).

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.

| <i>Field or Control</i>                  | <i>Description</i>   |
|--|--|
| <b>Bequest Name</b>                      | Name each bequest to differentiate multiple bequests from the same donor within the system. The name then appears on all pages of the component.   |
| <b>Bequest Date</b>                      | Enter the date that the bequest was made or that your institution learned of the bequest. The default is the current date.   |
| <b>Est Maturity</b> (estimated maturity) | Enter the estimated date of maturity.  |
| <b>Est Estate</b> (estimated estate)     | Enter the anticipated total value of the estate when the bequest matures.  |
| <b>Present Value</b>                     | Restate the estimated estate, adjusted for future inflation.   |
| <b>Bequest Status</b>                    | Select <i>Advised-Verbal</i> (the default), <i>Advised-Written</i> , <i>In Probate</i> , or <i>Matured</i> . The values for this field are delivered with the system as translate values. You can modify these translate values. |

| <b>Field or Control</b>               | <b>Description</b>  |
|---------------------------------------|---|
| <b>Status Dt</b> (status date)        | The system displays the date that the bequest status was most recently updated. |
| <b>Act Maturity</b> (actual maturity) | Enter the date of actual maturity.  |
| <b>Act Estate</b> (actual estate)     | Enter the total amount of the estate.   |

### Benefit to Institution

| <b>Field or Control</b>                  | <b>Description</b>  |
|--|---|
| <b>Estimated Value and Pct</b> (percent) | Enter the estimated value of the bequest or the percentage of the bequest that benefits your institution. |

### Other Beneficiaries

| <b>Field or Control</b>                  | <b>Description</b>  |
|--|---|
| <b>Beneficiary or Name</b>               | Select the ID or enter the name of the beneficiary.   |
| <b>Estimated Value and Pct</b> (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**).

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.

The screenshot shows the 'Bequest Detail 2' page for Shawn Gallegher. At the top, there are tabs for 'Bequest Detail', 'Bequest Detail 2', and 'Bequest Information'. The page header includes the constituent name 'Shawn Gallegher', ID 'AV0001', constituent type 'Alumni', year '2001', organization 'PSUNV', and prospect manager 'Mario Capozzelli'. Below this is a 'Bequest Detail' section with a 'Bequest Name' field containing 'Shawn Gallegher Bequest' and a 'Comments' text area. The 'Assets' section contains a table with columns for Asset Category, Description, Asset Value, and Value Date. The 'Codicils' section contains a table with columns for Date, Action to Will, and Description. The 'Installments' section contains a table with columns for Expected Date, Expected Amount, Actual Date, and Actual Amount.

### Assets

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Asset Category</b>   | If assets are named in the will, you can select an asset category. Asset categories are defined on the Asset Types page. |
| <b>Description</b>      | Enter a description (up to 60 characters) of the asset that is named in the will.  |
| <b>Asset Value</b>      | Enter the estimated monetary value of the asset.   |
| <b>Value Date</b>       | Enter the date on which the asset value was determined.  |

### Codicils

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Date</b>             | If the bequest has been amended, select the codicil date. |

| <b><i>Field or Control</i></b> | <b><i>Description</i></b>  |
|--------------------------------|--|
| <b>Action to Will</b>          | Enter a brief description of the action taken, such as beneficiary change, amount change, and so on. |
| <b>Description</b>             | Enter a more detailed description of the amendment.  |

## Installments

| <b><i>Field or Control</i></b>       | <b><i>Description</i></b>  |
|--------------------------------------|--|
| <b>Expected Date</b>                 | If the amount bequeathed is to be paid to your institution in installments, enter the expected date of each installment.   |
| <b>Expected Amount</b>               | If the amount bequeathed is to be paid to your institution in installments, enter the expected amount of each installment. |
| <b>Actual Date and Actual Amount</b> | 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**).

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.

The screenshot displays the 'Bequest Information' page for Shawn Gallegher. The page is divided into several sections:

- Header:** Shawn Gallegher, ID: AV0001, Constituent Type: Alumni, Year: 2001, PSUNV, Prospect Manager: Mario Capozzelli.
- Bequest Detail:** Bequest Name: Shawn Gallegher Bequest.
- Intended Distribution:** For: Scholarship for High School Leaders. Business Unit: PSUNV, Designation: EVERETTSCH, William C. Everett Scholarship, Type: Ultimate, Amount: 5,000,000.00 USD.
- External Contacts:** External Contact ID: AV0030, Name: Dennison, Adele, Alliance: Donor Representative, Start Date: 06/19/1998, End Date: [blank].
- Assigned Staff:** Staff ID: AV0024, Perkins, Darla, Role: SOL, Solicitor, Start Date: 06/05/1996, End Date: [blank].
- Attachments:** A table with columns for 'View' and 'Add Attachment'. The 'View' column contains a 'View' link, and the 'Add Attachment' column contains an 'Add Attachment' button.

## 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

| <i>Page Name</i>          | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|---------------------------|------------------------|--|--|
| Trust Detail              | AV_TRUST_DTL           | <b>Contributor Relations &gt; Prospect Management &gt; Planned Giving &gt; Trusts &gt; Trust Detail</b>              | Enter information about a donor's trust that benefits your institution.  |
| Trust Gift Information    | AV_TRUST_GINFO         | <b>Contributor Relations &gt; Prospect Management &gt; Planned Giving &gt; Trusts &gt; Trust Gift Information</b>    | Record information about additional gifts made to an established trust.  |
| Trust Account Information | AV_TRUST_AINFO         | <b>Contributor Relations &gt; Prospect Management &gt; Planned Giving &gt; Trusts &gt; Trust Account Information</b> | Track accounts that are associated with a trust that benefits your institution.  |
| Trust Beneficiary         | AV_TRUST_BFCY          | <b>Contributor Relations &gt; Prospect Management &gt; Planned Giving &gt; Trusts &gt; Trust Beneficiary</b>         | Track information about the benefit that your institution expects to receive and additional beneficiaries to a trust.  |
| Trust Information         | AV_TRUST_INFO          | <b>Contributor Relations &gt; Prospect Management &gt; Planned Giving &gt; Trusts &gt; Trust Information</b>         | 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**).

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 Detail   | Trust Gift Information | Trust Account Information | Trust Beneficiary  | Trust Information   |
|--|------------------------|---------------------------|--------------------|---|
| Shawn Gallegher  |                        | ID: AV0001                |                    |   |
| Constituent Type: <a href="#">Alumni</a>   |                        | Year: 2001                | Institution: PSUNV |   |
| <b>Trust Detail</b> <span style="float:right">Find   View All First 1 of 1 Last</span> |                        |                           |                    |   |
| *Trust Name:   | Gallegher Family Trust |                           |                    | <input type="button" value="+"/> <input type="button" value="-"/> |
| *Trust ID:   | 347898                 | Trust Status:             | Active             |   |
| *Trust Type:   | Remainder Trust        | Inception Date:           | 01/01/1980         |   |
| Trust Category:  | Regular Trust          | Start Date:               | 03/15/1982         |   |
| Trust Term:  | Fixed Number of Years  | Est Maturity:             | 03/15/2040         |   |
| Principal:   | 4,000,000.00 USD       | Trustee Fees:             | 500,000.00         |   |
| Payout Type:   | Pct                    | Amount:                   |                    |   |
| Payout Term:   | Annual                 | Percent:                  | 5.00               |   |
| <b>Trust Value</b> <span style="float:right">Find   View All First 1 of 1 Last</span>  |                        |                           |                    |   |
| Value Date   | Market Value           | Future Value              | Value Source       |   |
|  |                        |                           |                    |   |

| Field or Control               | Description  |
|--------------------------------|--|
| <b>Trust Name and Trust ID</b> | Enter a trust name (up to 60 characters long) and trust ID (up to 20 characters long).<br><br><b>Note:</b> The trust ID serves as an IRS tax ID number and should not be duplicated from one trust to another.   |
| <b>Trust Type</b>              | Select a trust type. Values are <i>Unitrust</i> , <i>Annuity Trust</i> , <i>Remainder Trust</i> , and <i>Charitable Lead Trust</i> . Trust types are defined on the Setup Trust Type page.   |
| <b>Trust Category</b>          | Select a trust category. Values are <i>Unitrust</i> , <i>Regular Trust</i> , <i>Net Income Trust</i> , <i>Net Income Trust with Make-Up</i> , and <i>Dry Charitable Remainder Trust</i> . Trust categories are defined on the Setup Trust Category page. |
| <b>Trust Term</b>              | Select the term that must be met before the trust is paid out. Values are <i>Fixed Number of Years</i> , <i>One Life</i> , and <i>Two Lives</i> .  |
| <b>Principal</b>               | Enter the amount of money with which the trust was funded.   |
| <b>Trust Status</b>            | Select the current state of the trust. Values are <i>Active</i> , <i>Inactive</i> , <i>Matured</i> , and <i>Under Agreement</i> .  |
| <b>Inception Date</b>          | 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.   |

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Est Maturity</b>     | Select the date that the trust matures.  |
| <b>Trustee Fees</b>     | Enter the amount of any fees that must be paid to the trustee.   |
| <b>Payout Type</b>      | Select the payout type. Values are <i>Fixed Amount</i> and <i>Percent</i> . Values for this field are delivered with the system as translate values. You can modify these translate values.  |
| <b>Amount</b>           | If you selected a payout type of <i>Fixed Amount</i> , enter the amount of each payout in this field.  |
| <b>Payout Term</b>      | Select the frequency with which payouts are made. Values are <i>Annual</i> , <i>Bi-Annual</i> , <i>Bi-Month</i> , <i>Monthly</i> , and <i>Quarterly</i> .<br><br>Values for this field are delivered with the system as translate values. You can modify these translate values. |
| <b>Percent</b>          | If you selected a payout type of <i>Percent</i> , enter the percentage of the trust that is given in each payout.  |

### Trust Value

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Value Date</b>       | Select the date the valuation is set.   |
| <b>Market Value</b>     | Enter the monetary value of the trust according to today's market.  |
| <b>Future Value</b>     | Enter the estimated monetary value of the trust on its maturity date.   |
| <b>Value Source</b>     | 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**).

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.

The screenshot shows a web interface with several tabs: Trust Detail, Trust Gift Information (selected), Trust Account Information, Trust Beneficiary, and Trust Information. The main content area displays the following information:

- Shawn Gallegher, ID: AV0001, Institution: PSUNV
- Constituent Type: Alumni, Year: 2001
- Trust Information: Trust Name: Gallegher Family Trust, Trust ID: 347898
- Gift Information: Gift Amount (input field), Gift Type (dropdown), Gift Date (calendar icon)
- Gift Value: Value Date (calendar icon, showing 10/19/2004), Future Value (input field), Liability (input field), Value Source (input field)
- Total Contributions: (input field) USD, Total Income: (input field)

| <i>Field or Control</i>          | <i>Description</i>  |
|----------------------------------|---|
| <b>Gift Amount and Gift Type</b> | For each gift to the trust, enter the gift amount and select a gift type.                         |
| <b>Gift Date</b>                 | Select the date on which the gift was received by your institution.                               |
| <b>Value Date</b>                | Select the date the valuation was set.  |
| <b>Future Value</b>              | Enter the estimated value of the new gift on its maturity date.                                   |
| <b>Liability</b>                 | Enter the obligation to your institution for the additional payout for the new gift.              |
| <b>Value Source</b>              | Enter a description of the person or publication providing information about the estimated value. |
| <b>Total Contributions</b>       | Enter the total amount paid to the trust by the donor.  |
| <b>Total Income</b>              | 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**).

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.

| Field or Control | Description  |
|------------------|--|
| 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**).

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**).

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.

The screenshot displays the 'Trust Information' page for a trust. At the top, there are tabs for 'Trust Detail', 'Trust Gift Information', 'Trust Account Information', 'Trust Beneficiary', and 'Trust Information'. The main header shows the constituent 'Shawn Gallegher' with ID 'AV0001', constituent type 'Alumni', year '2001', institution 'PSUNV', and prospect manager 'Mario Capozzelli'. Below this, the 'Trust Information' section shows the trust name 'Gallegher Family Trust' and ID '347898'. The 'Intended Distribution' section lists a scholarship for Journalism Majors with a business unit of 'PSUNV', designation 'EVERETTSCH', type 'Ultimate', and amount '2,000,000.00 USD'. The 'External Contacts' section shows contact 'Dennison, Adele' with alliance 'Donor Representativ'. The 'Assigned Staff' section shows staff member 'Elizabeth Burwell' with start date '06/01/1998'. At the bottom, there are 'Attachments' and 'Audit' tabs, and a table with 'View' and 'Add Attachment' buttons.

### 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   | <b>Contributor Relations &gt; Prospect Management &gt; Planned Giving &gt; Gift Annuities &gt; Gift Annuity Details</b>       | Enter detailed information about a donor's gift annuity to your institution.   |
| Gift Annuity Beneficiaries | AV_GIFTAN_BFCY  | <b>Contributor Relations &gt; Prospect Management &gt; Planned Giving &gt; Gift Annuities &gt; Gift Annuity Beneficiaries</b> | Track information about the benefit that your institution expects to receive and additional beneficiaries to a trust.  |
| Gift Annuity Information   | AV_GIFTAN_INFO  | <b>Contributor Relations &gt; Prospect Management &gt; Planned Giving &gt; Gift Annuities &gt; Gift Annuity Information</b>   | 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**).

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.

The screenshot displays the 'Gift Annuity Details' page for a constituent named 'Gallegher, Shawn' with ID 'AV0001'. The constituent is of type 'Alumni' and is associated with the institution 'PSUNV' for the year '2001'. The main form contains the following fields and values:

- \*Gift Annuity Name:** Gallegher Family Annuity
- \*Gift Annuity Type:** Charitable
- Inception Date:** 06/05/1996
- Start Date:** 06/16/1997
- Deferral Period:** 0
- Rate:** 5.00
- Gift Annuity Status:** Active
- Asset Category:** LAND (Land)
- Gift Amount:** 1,000,000.00 USD
- Gift Annuity Date:** 06/11/1996
- Reserve:** 100,000.00
- Liability:** 175,000.00

Below the main form is an 'Account Information' section with a search bar for 'Item Type' and a dropdown for 'Type'.

| <b>Field or Control</b>    | <b>Description</b>  |
|----------------------------|---|
| <b>Gift Annuity Name</b>   | Enter the formal gift annuity name (up to 60 characters).   |
| <b>Gift Annuity Type</b>   | Select a gift annuity type, <i>Charitable</i> or <i>Deferred</i> .<br><br>Values for this field are delivered with the system as translate values. You can modify these translate values. |
| <b>Deferral Period</b>     | If you selected a gift annuity type of <i>Deferred</i> , enter the number of years that the annuity will be deferred.   |
| <b>Rate</b>                | 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.  |
| <b>Inception Date</b>      | Enter the date on which the gift annuity was established.   |
| <b>Gift Annuity Status</b> | Select a gift annuity status:<br><br><i>Active</i> : Select to add a new gift annuity.<br><br><i>Inactive</i> : Select if your institution no longer recognizes this gift annuity.        |
| <b>Asset Category</b>      | Select the asset category that describes the assets used to fund the gift annuity. Asset categories are defined by your institution.  |
| <b>Gift Amount</b>         | Enter the gift amount of the contribution that was used to create the gift annuity.   |
| <b>Reserve</b>             | Enter the amount that your institution must carry to fund the annuity.  |
| <b>Gift Annuity Date</b>   | Enter the date that the contribution to fund the gift annuity was made to your institution.   |
| <b>Liability</b>           | 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**).

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**).

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.

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## 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

| <i>Page Name</i>            | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|-----------------------------|------------------------|---|--|
| Pooled Income Details       | AV_PINC_DTL            | <b>Contributor Relations &gt; Prospect Management &gt; Planned Giving &gt; Pooled Income Funds &gt; Pooled Income Details</b>       | Enter information about a pooled income fund at your institution and the donor's contributions to the fund.                        |
| Pooled Income Beneficiaries | AV_PINC_BFCY           | <b>Contributor Relations &gt; Prospect Management &gt; Planned Giving &gt; Pooled Income Funds &gt; Pooled Income Beneficiaries</b> | 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           | <b>Contributor Relations &gt; Prospect Management &gt; Planned Giving &gt; Pooled Income Funds &gt; Pooled Income Information</b>   | 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**).

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 Details   |                      | Pooled Income Beneficiaries                                   |  | Pooled Income Information   |  |
|---|----------------------|---|--|---|--|
| Shawn Gallegher   |                      | ID: AV0001  |  |    |  |
| Constituent Type: <a href="#">Alumni</a>  |                      | Year: 2001  |  | Institution: PSUNV  |  |
| <b>Pooled Income Details</b> <span style="float:right">Find   View All First 1 of 1 Last</span> |                      |   |  |   |  |
| *Pooled Income Fund Name:   |                      | PSUNV Pooled Income Fund <span style="float:right">+ -</span> |  |   |  |
| *Pooled Income Fund Type:   |                      | Balanced  |  | Inception Date: 06/04/1992 <span style="float:right">31</span>  |  |
| Total Contributions:  |                      | 25,000,000.00 USD   |  | PIF Status: Active <span style="float:right">-</span>   |  |
| <b>Units</b> <span style="float:right">Find   View All First 1 of 1 Last</span>                 |                      |   |  |   |  |
| Units Held  | Unit Value           | Total Value   | Date   |   |  |
| 150   | 100.00 USD           | 1,500.00  | 06/22/1998 <span style="float:right">31</span> |   |  |
| <b>Gift Information</b> <span style="float:right">Find   View All First 1 of 1 Last</span>      |                      |   |  |   |  |
| Gift Amt:   | 3.00 USD             | Units Purch:  | 2  | Date: 06/25/1998 <span style="float:right">31</span>  |  |
| <b>Gift Value</b> <span style="float:right">Find   View All First 1 of 1 Last</span>            |                      |   |  |   |  |
| Value Date  | Present Value        | Liability   |  |   |  |
| 06/25/1998 <span style="float:right">31</span>  | 1,800.00 USD         | 180.00 <span style="float:right">+ -</span>                   |  |   |  |
| <b>Account Information</b> <span style="float:right">Find   View All First 1 of 1 Last</span>   |                      |   |  |   |  |
| *Item Type:   | <input type="text"/> | *Type:  | <input type="text"/>                           | <span style="float:right">+ -</span>  |  |

| Field or Control                              | Description  |
|---|--|
| <b>Pooled Income Fund Name</b>                | Enter the formal pooled income fund name (up to 60 characters).  |
| <b>Pooled Income Fund Type</b>                | Select a pooled income fund type. Values include <i>Balanced</i> , <i>High Yield</i> , and any values your institution defines.<br><br>Values for this field are delivered with the system as translate values. You can modify these translate values. |
| <b>Total Contributions</b>                    | Enter the total contributions made by this donor to the pooled income fund.  |
| <b>Inception Date</b>                         | Select the date on which the pooled income fund agreement was established.   |
| <b>PIF Status</b> (pooled income fund status) | Select the PIF status. Values are:<br><br><i>Active</i> : Select when you add a new pooled income fund.<br><br><i>Inactive</i> : Select if your institution no longer recognizes this donor's participation in the fund.                               |

## Units

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Units Held</b>       | Enter the total number of units that the donor has purchased in the pooled income fund.             |
| <b>Unit Value</b>       | Enter the monetary value of a single unit in the pooled income fund.                                |
| <b>Total Value</b>      | Enter the total value of the units that the donor has purchased from within the pooled income fund. |
| <b>Date</b>             | Select the date on which the total value was set.   |

## Gift Information

| <i>Field or Control</i>              | <i>Description</i>  |
|--------------------------------------|---|
| <b>Gift Amt</b> (gift amount)        | If the donor purchases additional units in the pooled income fund, enter the amount of the gift used to purchase the units.       |
| <b>Units Purch</b> (units purchased) | Enter the number of units that the gift amount purchased in the pooled income fund.   |
| <b>Date</b>                          | Select the date that the gift was made to purchase units in the pooled income fund.   |
| <b>Value Date</b>                    | Select the date that the valuation is set.  |
| <b>Present Value</b>                 | Enter the present value of the pooled income fund in today's market.  |
| <b>Liability</b>                     | 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**).

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.

|   |   |                             |  |   |  |
|---|---|-----------------------------|--|---|--|
| Pooled Income Details   |   | Pooled Income Beneficiaries |  | Pooled Income Information   |  |
| Shawn Gallegher   |   | ID:                         | AV0001                                   |   |  |
| Constituent Type: <a href="#">Alumni</a>                                |   | Year:                       | 2001                                     | Institution: PSUNV  |  |
| <div style="text-align: right;">Find   View All First 1 of 1 Last</div> |   |                             |  |   |  |
| Fund Name:  | PSUNV Pooled Income Fund                            | Inception Date:             | 06/04/1992                               |   |  |
| Inst Est Value:   | <input type="text" value="1,600.00"/> USD           | Inst Actual Value:          | <input type="text"/>                     | <input type="checkbox"/> Irrevocable                              |  |
| Campaign:   | <input type="text" value="CAMP2000"/> Campaign 2000 |                             |  |   |  |
| Comments:   | <input type="text"/>                                |                             |  |   |  |
| <div style="text-align: right;">Find   View All First 1 of 1 Last</div> |   |                             |  |   |  |
| ID  | Name  | Status                      |  |   |  |
| <input type="text" value="AV0004"/>                                     | <input type="text" value="Holmgren, June"/>         | 1st                         |  | <input type="button" value="+"/> <input type="button" value="-"/> |  |
| Date of Birth:  | <input type="text"/>                                | SSN:                        | <input type="text" value="XXX-XX-XXXX"/> |   |  |
| Estimated Value:  | <input type="text" value="200.00"/>                 | Actual Value:               | <input type="text"/>                     | <a href="#">Address</a>   |  |

## Defining Institutional Pooled Income Fund Information

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

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.

|   |   |                             |  |   |   |
|---|---|-----------------------------|--|---|---|
| Pooled Income Details   |   | Pooled Income Beneficiaries |  | Pooled Income Information   |   |
| Shawn Gallegher   |   | ID:                         | AV0001                                       |   |   |
| Constituent Type: <a href="#">Alumni</a>  |   | Year:                       | 2001   | PSUNV   | Prospect Manager: Mario Capozzelli                                |
| <div style="text-align: right;">Find   View All First 1 of 1 Last</div>             |   |                             |  |   |   |
| Fund Name:  | PSUNV Pooled Income Fund  | Inception Date:             | 06/04/1992                                   |   |   |
| <div style="text-align: right;">Find   View All First 1 of 1 Last</div>             |   |                             |  |   |   |
| For:  | <input type="text" value="Campaign 2000"/>                          |                             |  |   |   |
| Business Unit   | Designation   | Type                        | Amount                                       |   |   |
| <input type="text" value="PSUNV"/>  | <input type="text" value="CAPCAMP2000"/> Capital Campaign 2000 Fund | Interim                     | <input type="text" value="1,600.00"/> USD    | <input type="button" value="+"/> <input type="button" value="-"/> |   |
| <div style="text-align: right;">Find   View All First 1 of 1 Last</div>             |   |                             |  |   |   |
| External Contact ID:  | <input type="text" value="AV0030"/>                                 | Name:                       | <input type="text" value="Dennison, Adele"/> | Alliance:   | Donor Representati  |
| Start Date:   | <input type="text" value="06/22/1998"/>                             | End Date:                   | <input type="text"/>                         | <a href="#">Address</a>   |   |
| <div style="text-align: right;">Find   View All First 1 of 1 Last</div>             |   |                             |  |   |   |
| Assigned Staff  |   |                             |  |   |   |
| Staff ID:   | <input type="text" value="AV0024"/>                                 | Perkins, Darla              | Start Date:                                  | <input type="text" value="06/07/1998"/>                           | <input type="button" value="+"/> <input type="button" value="-"/> |
| Role:   | <input type="text" value="SOL"/> Solicitor                          | End Date:                   | <input type="text"/>                         |   |   |
| <div style="text-align: right;">Customize   Find   View All First 1 of 1 Last</div> |   |                             |  |   |   |
| Attachments   | Audit   |                             |  |   |   |
| Attached File   | View  | Add Attachment              |  |   |   |
|   | View  | Add Attachmen               | <input type="button" value="-"/>             |   |   |

## 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.

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## 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

| <i>Page Name</i>       | <i>Definition Name</i>          | <i>Navigation</i>  | <i>Usage</i>  |
|------------------------|---------------------------------|--|---|
| Planned Giving Profile | AV_PG_PROFILE<br>AV_PG_PROFILE1 | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Planned Giving &gt; Update Planned Giving Profile</b></li> <li>• <b>Contributor Relations &gt; Prospect Management &gt; Planned Giving &gt; View Planned Giving Profile</b></li> </ul> | Summarize information about a constituent's participation as a prospective or actual donor of a planned gift. |
| Bequest Detail         | AV_BEQUEST1_SP                  | Click a <b>Bequest</b> 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 <b>Trust</b> link on the Planned Giving Profile page.  | View information about a trust and its beneficiaries.   |
| Gift Annuity Detail    | AV_GIFTAN1_SP                   | Click a <b>Gift Annuity</b> link on the Planned Giving Profile page.   | View information about a gift annuity, its account information, and its beneficiaries.                        |

| Page Name                 | Definition Name | Navigation   | Usage  |
|---------------------------|-----------------|--|--|
| Pooled Income Fund Detail | AV_PINC1_SP     | Click a <b>Pooled Income Fund</b> 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**).

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.

### Planned Giving Profile

Shawn Gallegher ID: AV0001

Constituent Type: [Alumni](#) Year: [2001](#) PSUNV Prospect Manager: Mario Capozzelli

Date of Birth: 07/03/1964 Date of Death:

Initial Request Date: PG Status:

Initial Response Date:  Include on PG Mailing List

| Planned Gifts   |  |                |            |                             |                          |                          |
|-----------------|--|----------------|------------|-----------------------------|--------------------------|--------------------------|
| Type            | Planned Gift Name                        | Inception Date | Start Date | Institution Estimated Value | Institution Actual Value | Irrevocable              |
| 1 Bequest       | <a href="#">Bequest</a>                  | 06/19/1998     |            | 2000000.00                  |                          |                          |
| 2 Trust         | <a href="#">Gallegher Family Trust</a>   | 01/01/1980     | 03/15/1982 | 2000000.00                  |                          | <input type="checkbox"/> |
| 3 Gift Annuity  | <a href="#">Gallegher Family Annuity</a> | 06/05/1996     | 06/16/1997 | 1000000.00                  |                          | <input type="checkbox"/> |
| 4 Pooled Income | <a href="#">PSUNV Pooled Income Fund</a> | 06/04/1992     |            | 1600.00                     |                          |                          |

| Field or Control   | Description  |
|--|--|
| <b>Initial Request Date</b>  | Enter the date on which the donor first inquired about a planned gift.   |
| <b>Initial Response Date</b>   | Enter the date on which your institution responded to the donor's request for information.   |
| <b>PG Status</b> (planned giving status)                                   | Select a planned giving status. Values include <i>Prospect</i> , <i>Suspect</i> , <i>In Discussion</i> , <i>Proposal Pending</i> , and <i>Donor</i> .<br><br>Values for this field are delivered with the system as translate values. You can modify these translate values. |
| <b>Include on PG Mailing List</b> (include on planned giving mailing list) | Select to include the donor in your institution's planned giving mailing list.   |
| <b>Planned Gift Name</b>   | Click any linked name to view its specifics on the appropriate detail page.  |

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Irrevocable</b>      | 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

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## 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

| <i>Page Name</i>  | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|-------------------|------------------------|---|--|
| Campaign          | AV_INTV_CMPGN_MAIN     | <b>Contributor Relations &gt; Initiatives &gt; Campaign Initiatives &gt; Manage Campaigns &gt; Campaign Initiatives</b>               | Begin the process of defining a new campaign initiative at your institution.   |
| Membership        | AV_INTV_MEMBR_MAIN     | <b>Contributor Relations &gt; Initiatives &gt; Membership Initiatives &gt; Membership Initiatives</b>                                 | Begin the process of defining a membership initiative at your institution.   |
| Volunteers        | AV_INTV_VOL_MAIN       | <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Manage Volunteer Initiatives &gt; Volunteer Initiatives</b> | Begin the process of defining a new volunteer initiative at your institution.  |
| Event             | AV_INTV_EVNT_MAIN      | <b>Contributor Relations &gt; Initiatives &gt; Event Initiatives &gt; Manage Events &gt; Event Initiatives</b>                        | Begin the process of defining a new event initiative at your institution.  |
| Other Initiatives | AV_INTV_OTHR_MAIN      | <b>Contributor Relations &gt; Initiatives &gt; Other Initiatives &gt; Manage Other Initiatives &gt; Other Initiatives</b>             | 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**).

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

| Campaign   | Audience   | Related Initiative               | Resources                               | PR Plan  |
|--|--|----------------------------------|---|--|
| <b>Campaign:</b> ANNFUND   |  |                                  |   | <b>Institution:</b> PSUNV                              |
| <b>Name:</b>   | <input type="text" value="Annual Fund Campaign"/>                              |                                  |   |  |
| <b>Description:</b>  | <input type="text" value="Annual fundraising campaign to alumni and friends"/> |                                  |   |  |
| <b>*Start Date:</b>  | <input type="text" value="07/01/2004"/>  | <b>End Date:</b>                 | <input type="text" value="06/30/2005"/> | <b>Reporting Level:</b> <input type="text" value="2"/> |
| <b>*Status:</b>  | <input type="text" value="Active"/>  | <b>*Business Unit:</b>           | <input type="text" value="MEDBU"/>      |  |
| <b>% Particptn Goal:</b>   | <input type="text" value="35.00"/>   | <b>*Phase:</b>                   | <input type="text" value="Public"/>     |  |
| <b>Financial Goal:</b>   | <input type="text" value="5,000,000.00"/>                                      | <input type="text" value="USD"/> |   |  |
| <b>Responsible Person</b> <span style="float:right">Find   View All   First   1 of 1   Last</span>     |  |                                  |   |  |
| <b>Person:</b>   | <input type="text" value="AV0026"/>  | Burwell,Elizabeth                | <b>*Eff Date:</b>                       | <input type="text" value="06/24/2004"/>                |
| <b>Responsible Department</b> <span style="float:right">Find   View All   First   1 of 1   Last</span> |  |                                  |   |  |
| <b>Department:</b>   | <input type="text"/>   |                                  |   | <input type="text"/>                                   |
| <b>*Start Date:</b>  | <input type="text"/>   | <b>End Date:</b>                 | <input type="text"/>                    |  |

### Fields Common to All Initiatives

| Field or Control       | Description  |
|------------------------|--|
| <b>Name</b>            | Name the initiative, up to 60 characters.  |
| <b>Reporting Level</b> | <p>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.</p> <p>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.</p> |
| <b>Business Unit</b>   | <p><b>Note:</b> Your selection determines the values you can choose from when selecting a responsible department, creating department goals, selecting a public relations appeal, and selecting an appeal for a budget expense.</p>  |

| <b>Field or Control</b>  | <b>Description</b>   |
|--|--|
| <b>% Particptn Goal</b> (percent participation goal) and <b>Financial Goal</b> | <p>Enter a participation goal percentage and a financial goal for the initiative. Goals indicate the amount of or percentage increase in participation that you expect to receive as a result of the initiative.</p> <p>For campaign initiatives, these fields are used in the Campaign Progress Report. For memberships, these fields are used in the Membership Progress page.</p>   |
| <b>Person</b>  | <p>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 <b>Quick Search</b> 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.</p> |
| <b>Department</b>  | <p>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.</p>   |

### If You Are Creating a Campaign Initiative

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Phase</b>            | <p>Select a phase to indicate whether the initiative is currently <i>Private</i> or <i>Public</i>.</p> <p>You may want to begin the campaign privately, identifying the pace-setting gifts that form the nucleus fund of the campaign. When the campaign has some momentum from the private phase, you can take it public to complete its goals.</p> |

### If You Are Creating a Membership Initiative

| <b>Field or Control</b>              | <b>Description</b>  |
|--------------------------------------|---|
| <b>Mbr Org</b> (member organization) | <p>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.</p> |

### If You Are Creating a Volunteer Initiative

| <b>Field or Control</b>                         | <b>Description</b>   |
|---|--|
| <b>Nbr Vol Goal</b> (number of volunteers goal) | Enter the number of volunteers you want to be involved in the initiative.                                  |
| <b>Vol Pool Goal</b> (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

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Event ID</b>         | 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.   |
| <b>New ID</b>           | 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.<br><br>See "Creating an Event" (Campus Community Fundamentals) |
| <b>Attendance Goal</b>  | Enter a goal that states the expected number of constituents attending the event.   |

### If You Are Creating an Other Initiative

| <b>Field or Control</b>            | <b>Description</b>   |
|------------------------------------|--|
| <b>Intv Type</b> (initiative type) | Enter an initiative type. The type you enter should be one not defined by your institution as <i>Campaign</i> , <i>Membership</i> , <i>Volunteer</i> , or <i>Event</i> . |

---

## Defining an Initiative Audience

This section discusses how to 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

| <i>Page Name</i>          | <i>Definition Name</i>  | <i>Navigation</i>  | <i>Usage</i>  |
|---------------------------|---|--|---|
| Audience                  | AV_INTV_CMPGN_AUD<br>AV_INTV_EVNT_AUD<br>AV_INTV_MEMBR_AUD<br>AV_INTV_VOL_AUD<br>AV_INTV_OTHR_AUD | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Initiatives &gt; Campaign Initiatives &gt; Manage Campaigns &gt; Campaign Initiatives &gt; Audience</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Membership Initiatives &gt; Membership Initiatives &gt; Audience</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Manage Volunteer Initiatives &gt; Audience</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Event Initiatives &gt; Manage Events &gt; Audience</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Other Initiatives &gt; Manage Other Initiatives &gt; Other Initiatives &gt; Audience</b></li> </ul> | Define the target audiences, or populations and sub-populations of constituents related to an initiative.   |
| Audience Detail           | AV_AUD_CRIT_SP  | Click the <b>Audience Detail</b> button on the Audience page.  | View additional information about an audience.  |
| Initiative Audience Build | AV_RUNCTL_INTV  | <b>Contributor Relations &gt; Initiatives &gt; Process Initiatives &gt; Initiative Audience Build</b>  | 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.

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

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Pers/Org</b>         | Select an option: <i>Person</i> , <i>Organization</i> , or <i>Both</i> . The value <i>Both</i> is only available if you selected the Population Selection process.   |
| <b>Audience</b>         | 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.  |
| <b>Audience Type</b>    | <p>Select the reason that the audience you entered has been chosen. Values for this field (<i>Segmentation</i>, <i>Reporting</i>, and <i>Administrative</i>) are delivered with the system as translate values. <i>Segmentation</i> is a required value. Do not modify these values in any way. Any modifications to these values will require a substantial programming effort.</p> <p>Use <i>Reporting</i> to report the progress of the campaign. Use <i>Administrative</i> to create an audience of those responsible for the campaign. Use <i>Segmentation</i> for marketing purposes.</p> <hr/> <p><b>Note:</b> Segmentation is the only type available for setting campaign goals.</p> <hr/> <p>Select <i>Segmentation</i> to include this audience for this initiative in the list of <b>Audience Code</b> values on the Initiative Goals page and PR Plan page. <i>Reporting</i> and <i>Administration</i> are not relevant to the Initiative Goals page.</p> |
| <b>Query Name</b>       | 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.  |
| <b>Workset Name</b>     | 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.  |
| <b>Audience Detail</b>  | 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.

| <i>Field or Control</i>  | <i>Description</i>   |
|--------------------------|--|
| <b>Build Temp Tables</b> | 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. |

| <b><i>Field or Control</i></b>        | <b><i>Description</i></b>  |
|---------------------------------------|--|
| <b>Merge into Initiative Audience</b> | 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

| <i>Page Name</i>   | <i>Definition Name</i>   | <i>Navigation</i>   | <i>Usage</i>   |
|--------------------|--|---|--|
| Related Initiative | AV_INTV_CMPGN_RLTD<br>AV_INTV_EVNT_RLTD<br>AV_INTV_MEMBR_RLTD<br>AV_INTV_VOL_RLTD<br>AV_INTV_OTHR_RLTD | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Initiatives &gt; Campaign Initiatives &gt; Manage Campaigns &gt; Campaign Initiatives &gt; Related Initiatives</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Membership Initiatives &gt; Membership Initiatives &gt; Related Initiatives</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Manage Volunteer Initiatives &gt; Related Initiatives</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Event Initiatives &gt; Manage Events &gt; Related Initiatives</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Other Initiatives &gt; Manage Other Initiatives &gt; Other Initiatives &gt; Related Initiatives</b></li> </ul> | 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**).

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.

Campaign
Audience
Related Initiative
Resources
PR Plan

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

**Related Initiatives**
Customize | Find | View All | First 1 of 1 Last

| *Type   | Level | *Intv Cd  | Initiative | Start Date | End Date |
|---------|-------|-----------|------------|------------|----------|
| 1 OTHER | 1     | INIT_OTHR |            |            |          |

You can link campaigns, volunteer efforts, membership initiatives, events, or other institution-defined initiative types as a subunit of an initiative.

| <b>Field or Control</b>          | <b>Description</b>   |
|----------------------------------|--|
| <b>Type</b>                      | Select the initiative type to relate to the initiative with which you are working, such as <i>Campaign</i> , <i>Event</i> , <i>Membership</i> , <i>Other</i> , and <i>Volunteer</i> .  |
| <b>Level</b>                     | Select the reporting level of the initiative to relate to the initiative that you are working with. Select a level from <i>1</i> to <i>999</i> . Level <i>1</i> is the highest reporting level; you cannot relate same-type initiatives with the same reporting level.   |
| <b>Intv Cd</b> (initiative code) | Select the initiative code for the initiative to relate to the initiative with which you are working.<br><br><b>Important!</b> 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

| <i>Page Name</i> | <i>Definition Name</i>   | <i>Navigation</i>   | <i>Usage</i>   |
|------------------|--|---|--|
| Resources        | AV_INTV_CMPGN_RSRC<br>AV_INTV_EVNT_RSRC<br>AV_INTV_MEMBR_RSRC<br>AV_INTV_VOL_RSRC<br>AV_INTV_OTHR_RSRC | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Initiatives &gt; Campaign Initiatives &gt; Manage Campaigns &gt; Campaign Initiatives &gt; Resources</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Membership Initiatives &gt; Membership Initiatives &gt; Resources</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Manage Volunteer Initiatives &gt; Resources</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Event Initiatives &gt; Manage Events &gt; Resources</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Other Initiatives &gt; Manage Other Initiatives &gt; Other Initiatives &gt; Resources</b></li> </ul> | 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**).

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

|   |  |                        |  |                                |  |                            |  |   |  |
|---|--|------------------------|--|--------------------------------|--|----------------------------|--|---|--|
| Campaign                                      |  | Audience               |  | Related Initiative             |  | <b>Resources</b>           |  | PR Plan                                 |  |
| <b>Campaign:</b> ANNFUND Annual Fund Campaign |  |                        |  | <b>Institution:</b> PSUNV      |  |                            |  |   |  |
| <b>Responsible Manager</b>                    |  |                        |  |                                |  |                            |  | Find   View All   First   1 of 1   Last |  |
| AV0029  |  | Northmar,Brighton      |  | <b>*Start Date:</b> 08/01/2004 |  |                            |  | + -                                     |  |
| <b>Staff Role:</b> PM                         |  | Prospect Manager       |  | <b>End Date:</b> 06/30/2005    |  |                            |  | + -                                     |  |
| <b>Other Primary Staff Resources</b>          |  |                        |  |                                |  |                            |  | Find   View All   First   1 of 1   Last |  |
| AV0026  |  | Burwell,Elizabeth      |  | <b>*Start Date:</b> 10/01/2004 |  |                            |  | + -                                     |  |
| <b>Staff Role:</b> SOL                        |  | Solicitor              |  | <b>End Date:</b> 01/01/2005    |  |                            |  | + -                                     |  |
| <b>Responsible Unit</b>                       |  |                        |  |                                |  |                            |  | Find   View All   First   1 of 1   Last |  |
| ANNLGVG                                       |  | Annual Giving          |  | <b>*Start Date:</b> 08/01/2004 |  |                            |  | + -                                     |  |
| <b>Unit Role:</b>                             |  |                        |  | <b>End Date:</b> 06/30/2005    |  |                            |  | + -                                     |  |
| <b>Resource Type</b>                          |  | <b>Initiative Type</b> |  | <b>Initiative</b>              |  | <b>Volunteer Structure</b> |  |   |  |
| Initiative                                    |  |                        |  |                                |  |                            |  | New Vol                                 |  |

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.

| <b>Field or Control</b>                               | <b>Description</b>   |
|---|--|
| <b>Staff Role</b> (responsible manager staff role)    | <p>In the upper left hand field of the <b>Responsible Manager</b> 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.</p> <p>In the <b>Staff Role</b> field, enter the role of the responsible manager at the institution. Examples of staff roles are <i>Prospect Manager</i>, <i>Campaign Manager</i>, <i>Solicitor</i>, and so on. Roles are defined by your institution using the Roles page. Only valid defined staff and units are available for assignment.</p>  |
| <b>Staff Role</b> (other primary staff resource role) | <p>In the upper left hand field of the <b>Other Primary Staff Resources</b> 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.</p> <hr/> <p><b>Important!</b> 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.</p> <hr/> <p>In the <b>Staff Role</b> field, enter the role of the staff member at the institution. Examples of staff roles are <i>Prospect Manager</i>, <i>Campaign Manager</i>, <i>Solicitor</i>, and so on. Roles are determined by your institution.</p> |

| <b>Field or Control</b>                  | <b>Description</b>   |
|--|--|
| <b>Unit Role</b> (responsible unit role) | In the upper left hand field of the <b>Responsible Unit</b> group box, enter the name of the unit that is responsible for the initiative.<br><br>In the <b>Unit Role</b> field, enter the purpose of the unit at the institution. Roles are determined by your institution.                  |
| <b>Resource Type</b>                     | Assign a volunteer as a resource. Values include <i>Initiative</i> or <i>Mbr Org</i> (member organization).  |
| <b>Initiative Type</b>                   | If you selected <i>Initiative</i> as a resource type, select an initiative type associated with the volunteer.   |
| <b>Initiative</b>                        | If you selected <i>Initiative</i> as a resource type, select the initiative with which the volunteer is associated.  |
| <b>Mbr Org Code</b>                      | If you selected <i>Mbr Org</i> as a resource type, select the code with which the volunteer is associated.   |
| <b>Volunteer Structure</b>               | 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 <b>New Vol</b> button to create one. |
| <b>New Vol</b> (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

| <i>Page Name</i>                | <i>Definition Name</i>   | <i>Navigation</i>   | <i>Usage</i>  |
|---------------------------------|--|---|---|
| PR Plan (public relations plan) | AV_INTV_CMPGN_PLAN<br>AV_INTV_EVNT_PLAN<br>AV_INTV_MEMBR_PLAN<br>AV_INTV_VOL_PLAN<br>AV_INTV_OTHR_PLAN | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Initiatives &gt; Campaign Initiatives &gt; Manage Campaigns &gt; Campaign Initiatives &gt; PR Plan</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Membership Initiatives &gt; Membership Initiatives &gt; PR Plan</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Manage Volunteer Initiatives &gt; PR Plan</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Event Initiatives &gt; Manage Events &gt; PR Plan</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Other Initiatives &gt; Manage Other Initiatives &gt; Other Initiatives &gt; PR Plan</b></li> </ul> | 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**).

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.

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Message</b>          | Enter information about the content of the actual communication that is sent.  |
| <b>Method</b>           | 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.   |
| <b>Frequency</b>        | <p>Select how often a communication is sent. Frequencies include <i>Daily</i>, <i>Weekly</i>, <i>Monthly</i>, <i>Quarterly</i>, <i>Bi-Annually</i>, or <i>Annually</i>. The values for this field are delivered with the system as translate values. You can modify these translate values.</p> <hr/> <p><b>Important!</b> 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</p> <hr/> |
| <b>Appeal</b>           | Select an appeal to relate the public relations plan to a specific appeal defined for the initiative. For example, <i>Annual Honor Roll</i> 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.  |

| <i>Field or Control</i>           | <i>Description</i>   |
|-----------------------------------|--|
| <b>Completed</b>                  | 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.   |
| <b>Audience Type and Audience</b> | Select an audience type and an audience for the communication. Audiences include only those defined on the Audience page for this initiative.  |
| <b>Seq Nbr</b> (sequence number)  | Indicates which step you are creating in the public relations plan.  |
| <b>Build Actions</b>              | <p>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.</p> <hr/> <p><b>Important!</b> 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.</p> <hr/> |

**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<br>AV_INTV_MEMBR_ATCH<br>AV_INTV_EVNT_ATCH<br>AV_INTV_VOL_ATCH<br>AV_INTV_OTHR_ATCH | <ul style="list-style-type: none"> <li>Contributor Relations, Initiatives, Campaign Initiatives, Manage Campaigns, Campaign Initiatives, Attachments</li> <li>Contributor Relations, Initiatives, Membership Initiatives, Membership Initiatives, Attachments</li> <li>Contributor Relations, Initiatives, Event Initiatives, Manage Event Initiatives, Event Initiatives, Attachments</li> <li>Contributor Relations, Initiatives, Volunteer Initiatives, Manage Volunteer Initiatives, Volunteer Initiatives, Attachments</li> <li>Contributor Relations, Initiatives, Other Initiatives, Manage Other Initiatives, Other Initiatives, Attachments</li> </ul> | 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**).

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

| <i>Page Name</i> | <i>Definition Name</i>   | <i>Navigation</i>  | <i>Usage</i>                                      |
|------------------|--|--|---|
| Budget           | AV_INTV_CMPGN_BDGT<br>AV_INTV_EVNT_BDGT<br>AV_INTV_MEMBR_BDGT<br>AV_INTV_VOL_BDGT<br>AV_INTV_OTHR_BDGT | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Initiatives &gt; Campaign Initiatives &gt; Manage Campaigns &gt; Campaign Budget</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Membership Initiatives &gt; Membership Budget</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Manage Volunteer Initiatives &gt; Volunteer Budget</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Event Initiatives &gt; Manage Events &gt; Event Budget</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Other Initiatives &gt; Manage Other Initiatives &gt; Other Initiative Budget</b></li> </ul> | Create a simple expense budget for an initiative. |

| <i>Page Name</i> | <i>Definition Name</i>   | <i>Navigation</i>   | <i>Usage</i>                                   |
|------------------|--|---|--|
| Budget Detail    | AV_INTV_CMPGN_BDTL<br>AV_INTV_EVNT_BDTL<br>AV_INTV_MEMBR_BDTL<br>AV_INTV_VOL_BDTL<br>AV_INTV_OTHR_BDTL | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Initiatives &gt; Campaign Initiatives &gt; Manage Campaigns &gt; Campaign Budget Detail</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Membership Initiatives &gt; Membership Budget Detail</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Manage Volunteer Initiatives &gt; Volunteer Budget Detail</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Event Initiatives &gt; Manage Events &gt; Event Budget Detail</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Other Initiatives &gt; Manage Other Initiatives &gt; Other Initiative Budget Detail</b></li> </ul> | 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.

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Overall Budget</b>   | Enter the total amount allocated as the expense budget for the initiative. |

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Budget Category</b>  | 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. |
| <b>Category Budget</b>  | 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**).

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Budget Category</b>  | 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.  |
| <b>Description</b>      | Describe the expense, entering up to 25 characters.  |
| <b>Appeal</b>           | (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.<br><br>You must link each expense with an appeal to accurately track expenses for that appeal. |
| <b>Expense Amount</b>   | 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

| <i>Page Name</i>  | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>                                  |
|-------------------|------------------------|--|---|
| Initiative Action | AV_INTV_ACTN           | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Initiatives &gt; Campaign Initiatives &gt; Campaign Actions &gt; Initiative Action</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Membership Initiatives &gt; Membership Actions &gt; Initiative Action</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Event Initiatives &gt; Manage Event Initiatives &gt; Event Actions &gt; Initiative Action</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Manage Volunteer Initiatives &gt; Volunteer Initiative Actions &gt; Initiative Action</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Other Initiatives &gt; Other Initiative Actions &gt; Initiative Action</b></li> </ul> | Create actions associated with an initiative. |

| <i>Page Name</i>                 | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>  |
|----------------------------------|------------------------|--|---|
| Action Info (action information) | AV_INTV_ACTN2          | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Initiatives &gt; Campaign Initiatives &gt; Campaign Actions &gt; Action Info</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Membership Initiatives &gt; Membership Actions &gt; Action Info</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Event Initiatives &gt; Manage Event Initiatives &gt; Event Actions &gt; Action Info</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Manage Volunteer Initiatives &gt; Volunteer Initiative Actions &gt; Action Info</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Other Initiatives &gt; Other Initiative Actions &gt; Action Info</b></li> </ul> | 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**).

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.

| Initiative Action                     |   | Action Info                         |  |
|---------------------------------------|---|-------------------------------------|--|
| <b>Initiative:</b>                    | SCHOLARSHP Scholarship Campaign         | <b>Institution:</b>                 | PSUNV                                      |
| <b>Action Number:</b>                 | 25                                      |                                     |  |
| <b>Action:</b>                        | <input type="text" value="Appeal"/>     |                                     |  |
| <b>Planned Date:</b>                  | <input type="text" value="09/19/2000"/> | <b>Action Type:</b>                 | <input type="text"/>                       |
| <b>Expiration Date:</b>               | <input type="text"/>                    | <b>Contact Type:</b>                | <input type="text"/>                       |
| <b>Complete Date:</b>                 | <input type="text"/>                    | <b>*Status:</b>                     | <input type="text" value="SCH"/> Scheduled |
| <b>Description:</b>                   | <input type="text"/>                    |                                     |  |
| <b>Responsible Person:</b>            | <input type="text" value="Staff"/>      | <input type="text" value="AV0027"/> | Lisele Boudreaux                           |
| <b>Initiative Responsible Person:</b> |   |                                     |  |

| <b>Field or Control</b>              | <b>Description</b>   |
|--------------------------------------|--|
| <b>Action</b>                        | Describe the action, using up to 30 characters.  |
| <b>Action Type</b>                   | Select a classification for the action. Actions are typically things such as <i>Design Session</i> , <i>Hire Contractor</i> , and so on. Action types are defined on the Action Types page.  |
| <b>Expiration Date</b>               | (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. |
| <b>Contact Type</b>                  | Determine whether the action is made through a <i>telephone call</i> , <i>letter</i> , <i>email</i> , <i>personal visit</i> , and so on. Contact types are defined by your institution.  |
| <b>Description</b>                   | 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.              |
| <b>Responsible Person</b>            | Select the name and ID of the person overseeing the action.  |
| <b>Initiative Responsible Person</b> | The person responsible for the initiative appears.   |

## Adding Action Information

Access the Action Info page (**Contributor Relations > Initiatives > Campaign Initiatives > Campaign Actions > Action Info**).

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 Action
Action Info

**Initiative:** SCHOLARSHIP Scholarship Campaign
**Institution:** PSUNV

**Action:** Appeal/
**Action Type:**

Action for Other Initiatives
Find | View All First 1 of 1 Last

**Initiative Type**
**Initiative**

+ -

Others Assigned
Find | View All First 1 of 1 Last

**Type**
**Resource Assigned**
**Role**

+ -

**Complete Date:**
**Result Code:**

| <i>Field or Control</i>                  | <i>Description</i>   |
|--|--|
| <b>Initiative Type and Initiative</b>    | Select these to add this action to the To Do List for another initiative.  |
| <b>Type, Resource Assigned, and Role</b> | Select the resource type, resource ID, and role.<br><br>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. |
| <b>Result Code</b>                       | When the action status has been changed to <i>Complete</i> , 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

| <i>Page Name</i>                  | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|-----------------------------------|------------------------|---|---|
| Initiative Action Summary         | AV_INTV_ACTN_SMRY      | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Initiatives &gt; Campaign Initiatives &gt; Initiative Action Summary</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Membership Initiatives &gt; Membership Action Summary</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Event Initiatives &gt; Event Action Summary</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Volunteer Action Summary</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Other Initiatives &gt; Oth Initiative Action Summary</b></li> </ul> | View information about the existing actions for an initiative at your institution.      |
| Action Detail                     | AV_INTV_ACTN_SP        | Click the <b>Details</b> link on the Action Summary page.   | View additional information about an initiative action.                                 |
| Other Initiatives/Others Assigned | AV_INTV_ACTN2_SP       | Click the <b>Resource Assignment</b> 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 [Viewing To Do Lists](#).

### 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

| <i>Page Name</i> | <i>Definition Name</i>  | <i>Navigation</i>   | <i>Usage</i>   |
|------------------|---|---|--|
| Related Goals    | AV_INTV_CMPGN_R_G<br>AV_INTV_EVNT_R_G<br>AV_INTV_MEMBR_R_G<br>AV_INTV_VOL_R_G<br>AV_INTV_OTHR_R_G | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Initiatives &gt; Campaign Initiatives &gt; Campaign Related Goals Summary</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Membership Initiatives &gt; Membership Related Goals</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Volunteer Related Goal Summary</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Event Initiatives &gt; Event Related Goals</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Other Initiatives &gt; Other Initiative Related Goals</b></li> </ul> | 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

| <i>Page Name</i>                               | <i>Definition Name</i>  | <i>Navigation</i>   | <i>Usage</i>   |
|--|---|---|--|
| Related Rspn Prsn (related responsible person) | AV_INTV_CMPGN_R_S<br>AV_INTV_EVNT_R_S<br>AV_INTV_MEMBR_R_S<br>AV_INTV_VOL_R_S<br>AV_INTV_OTHR_R_S | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Initiatives &gt; Campaign Initiatives &gt; Campaign Related Resources</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Membership Initiatives &gt; Membership Related Resources</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Initiative Volunteers &gt; Volunteer Related Resources</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Event Initiatives &gt; Event Related Resources</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Other Initiatives &gt; Related Initiative Resources</b></li> </ul> | 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.

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**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" (Campus Community Fundamentals)

---

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:

| <i>Field Name</i> | <i>Value taken from this field</i> |
|-------------------|------------------------------------|
| 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.

| <i>Table</i>   | <i>Field</i> | <i>Key</i> |
|----------------|--------------|------------|
| 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:

| <b>Field Name</b> | <b>Value taken from this field</b> |
|-------------------|------------------------------------|
| 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.

| <b>Table</b>   | <b>Field</b>   | <b>Key</b> |
|----------------|----------------|------------|
| AV_MEMBERSHIP  | INSTITUTION    | Yes        |
| AV_MEMBERSHIP  | AV_MBR_ORG_COD | Yes        |
| AV_MEMBERSHIP  | AV_DUES_LVL    |            |
| AV_MEMBERSHIP  | AV_MBRSH_TYP   |            |
| AV_MEMBERSHIP  | START_DT       |            |
| AV_MEMBERSHIP  | EXPIRATION_DT  |            |
| AV_MEMBERSHIP  | MBR_TYPE       |            |
| AV_MEMBERSHIP  | MOTIVATION_CD  |            |
| AV_MEMBERSHIP  | SESSION_NO     |            |
| EVNT_3C_GRP_VW | EVENT_3CS_ID   |            |

After the CR-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

| <b>Page Name</b>       | <b>Definition Name</b> | <b>Navigation</b>  | <b>Usage</b>  |
|------------------------|------------------------|--|---|
| Student Administration | MC_DEFN_SA             | <b>Contributor Relations &gt; Initiatives &gt; Process Initiatives &gt; Initiative Mass Change &gt; Student Administration</b> | Specify Campus Solutions-specific mass change parameters. |

| <i>Page Name</i>      | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|-----------------------|------------------------|---|--|
| Criteria and Defaults | MC_DEFN_01             | <b>Contributor Relations &gt; Initiatives &gt; Process Initiatives &gt; Initiative Mass Change &gt; Criteria and Defaults</b> | 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**).

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.

| Description                         | Student Administration                             | Criteria and Defaults        | Generate SQL                                      | Execution History |
|-------------------------------------|--|------------------------------|---|-------------------|
| <b>Mass Change Definition:</b>      |  | CR-Intv-Insert 3CEngine      |   |                   |
| <b>Additional Parameters</b>        |  |                              |   |                   |
| <b>*Mass Change Default Status:</b> | <input type="text" value="Pending"/>               |                              |   |                   |
| <b>*As Of Date:</b>                 | <input type="text" value="09/27/2006"/>            | <b>*As of Date/Time:</b>     | <input type="text" value="09/27/2006 2:25:42PM"/> |                   |
| <b>Begin Time:</b>                  | <input type="text"/>                               | <b>End Time:</b>             | <input type="text"/>                              |                   |
| <b>Aid Year:</b>                    | <input type="text" value="2004"/>                  | Financial Aid Year 2003-2004 |   |                   |
| <b>Academic Career:</b>             | <input type="text" value="UGRD"/>                  | Undergraduate                |   |                   |
| <b>SetID:</b>                       | <input type="text" value="PSUNV"/>                 | Peoplesoft University        |   |                   |
| <b>Academic Institution:</b>        | <input type="text" value="PeopleSoft University"/> |                              |   |                   |
| <b>Stdnt Fin Business Unit:</b>     | <input type="text"/>                               |                              |   |                   |
| <b>CR Business Unit:</b>            | <input type="text" value="LAWBU"/>                 | Law BU                       |   |                   |
| <b>Comments:</b>                    | <input type="text"/>                               |                              |   |                   |

| <i>Field or Control</i>     | <i>Description</i>  |
|-----------------------------|---|
| <b>Academic Institution</b> | Enter the institution for which the communications are to be created when the mass change process is run.   |
| <b>CR Business Unit</b>     | 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 <i>Membership Organization</i> 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.

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.

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <p><b>Criteria</b></p>  | <p>Set criteria values using SQL operators and values. For example, to select an audience type of Segmentation, you would select <i>Equal To</i> and enter a field value of <i>S</i>.</p> <p>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.</p> |
| <p><b>Field</b></p>     | <p>You can enter only one SQL operator per criteria. However, if you select a criteria option such as <i>In</i>, you can list multiple values by placing the cursor in the <b>Field Value</b> field and inserting rows.</p>  |

**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

| <i>Field or Control</i>           | <i>Description</i>   |
|-----------------------------------|--|
| <b>Execute Single Mass Change</b> | <p>To run each mass change definition individually, select <i>Execute Single Mass Change</i>.</p> <p>If you select this option, you must run each of the four mass change definitions in the process separately.</p>   |
| <b>Execute Mass Change Group</b>  | <p>To run more than one mass change definition at one time, select <i>Execute Mass Change Group</i> as the mass change run type.</p> <p>If you select <i>Execute Mass Change Group</i> and you are running mass change for an initiative, run AV-Initiative-Step1 followed by AV-Initiative-Step2.</p> <p>If you select <i>Execute Mass Change Group</i> and you are running mass change for a membership organization, run AV-Membership-Step1 followed by AV-Membership-Step2.</p> <hr/> <p><b>Note:</b> You can verify the data by running an SQL statement against the temporary table or the communication table.</p> <hr/> |
| <b>Mass Change Definition</b>     | 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" (Campus Community Fundamentals)



## Chapter 12

# Managing Campaigns

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## 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.

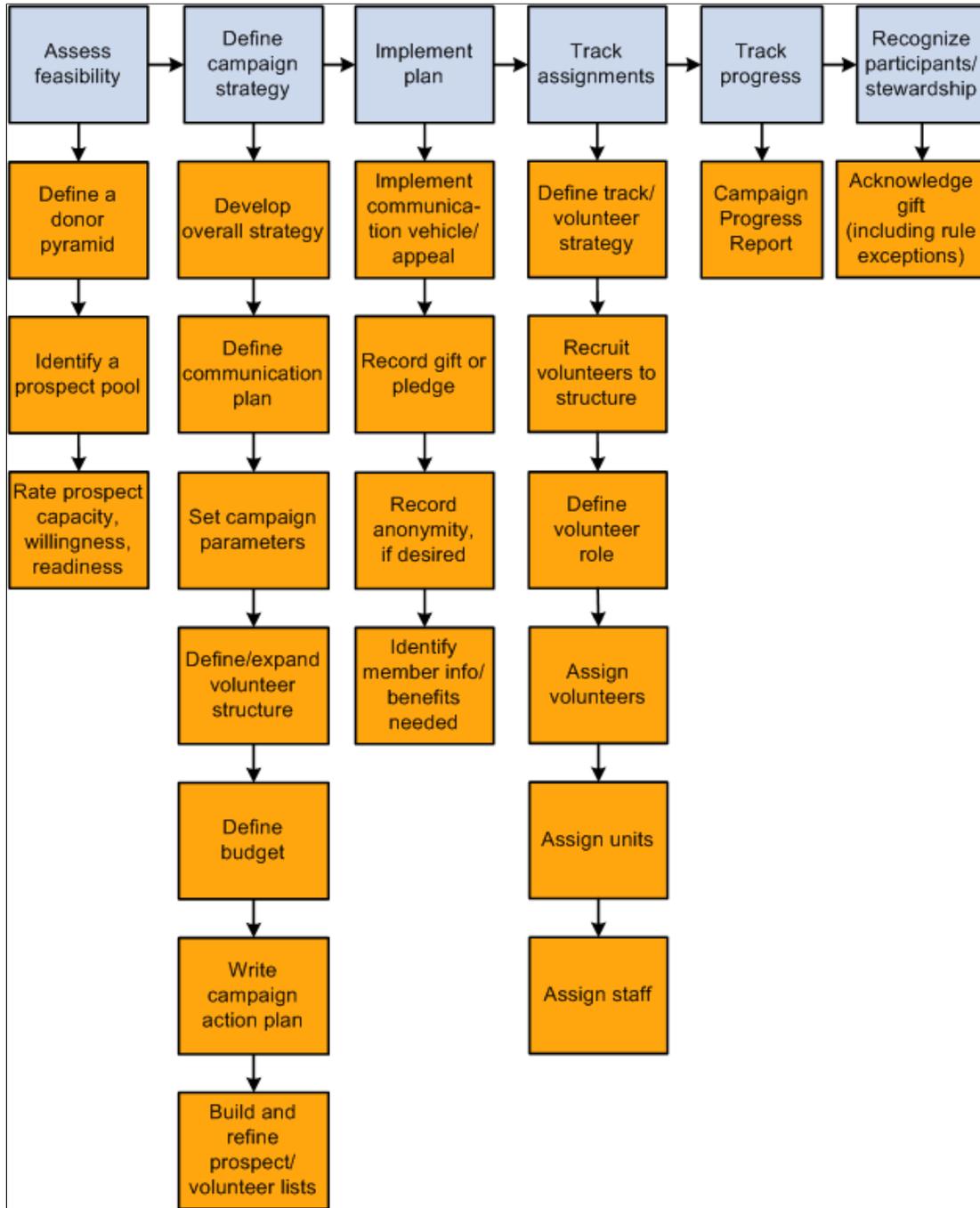
See [Setting Up Campaigns](#).

### 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.

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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|------------------|------------------------|---|--|
| Initiative Goals | AV_INTV_CMPGN_GOAL     | <b>Contributor Relations &gt; Initiatives &gt; Campaign Initiatives &gt; Manage Campaigns &gt; Campaign Goals &gt; Initiative Goals</b> | Set intermediate goals or milestone for an initiative.           |
| Annual Goals     | AV_CMPGN_ANNUAL        | <b>Contributor Relations &gt; Initiatives &gt; Campaign Initiatives &gt; Manage Campaigns &gt; Campaign Goals &gt; Annual Goals</b>     | Set goals for each year of the campaign cycle.                   |
| Department Goals | AV_CMPGN_DEPT_GOAL     | <b>Contributor Relations &gt; Initiatives &gt; Campaign Initiatives &gt; Manage Campaigns &gt; Campaign Goals &gt; Department Goals</b> | Set campaign goals for specific departments at your institution. |

| <b>Page Name</b> | <b>Definition Name</b> | <b>Navigation</b>   | <b>Usage</b>  |
|------------------|------------------------|---|---|
| Unit Goals       | AV_CMPGN_UNIT_GOAL     | <b>Contributor Relations &gt; Initiatives &gt; Campaign Initiatives &gt; Manage Campaigns &gt; Campaign Goals &gt; Unit Goals</b> | 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.

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.

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Target Date</b>      | Select the target date or date by which the goal might be reached.  |
| <b>Goal Type</b>        | Select the goal type or the measurement by which you track the goal's progress. Valid goal types are <i>% Income</i> , <i>Financial</i> , <i>% Participation</i> , <i>Number of Donors</i> , and <i>Number of Volunteers</i> . Your institution can define additional goal types. |

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Audience Code</b>    | Select the audience code the goal pertains to. Only those populations defined by your institution with the type of <i>Segmentation</i> 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**).

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.

The screenshot displays the 'Annual Goals' page for a campaign named 'ANNFUND' (Annual Fund Campaign) at the institution 'PSUNV'. The page is organized into several sections:

- Campaign Information:** Campaign: ANNFUND, Annual Fund Campaign; Institution: PSUNV.
- Financial and Campaign Details:** Financial Goal: 5,000,000.00 USD; Length of Campaign: 1 year/0 month.
- Goal Management:** Campaign Year: 1. Includes navigation links like 'Find | View All', 'First', '1 of 1', and 'Last'.
- Goal Fields:**
  - \*Effective Date: 07/01/1998
  - Dollar Goal: 100000
  - Nbr Donors Goal: 5000
  - Avg Gift Goal: 1000
  - Nbr Vol Goal: 35
  - Pct Increase: 25
  - Nbr Prspct Goal: 3000
- Table of Goals:**

| *Constituent Type | Goal Amount | Nbr Donors |
|-------------------|-------------|------------|
| Alumni            | 500000      | 4000       |

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.

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Campaign Year</b>    | 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. |

| <b>Field or Control</b>                           | <b>Description</b>   |
|---|--|
| <b>Dollar Goal</b>                                | Enter the monetary portion of the overall goal that you expect to receive during this campaign year.   |
| <b>Avg Gift Goal</b> (average gift goal)          | Enter the expected gift when averaged out over all donors for this campaign year.  |
| <b>Pct Increase</b> (percentage increase)         | Enter the increase in overall giving from one year to the next.  |
| <b>Nbr Donors Goal</b> (number of donors goal)    | Enter the anticipated number of donors for this campaign year.   |
| <b>Nbr Vol Goal</b> (number of volunteers goal)   | Enter the anticipated number of volunteers to be involved with the campaign during this goal year.   |
| <b>Nbr Prspct Goal</b> (number of prospects goal) | Enter the anticipated number of prospects to made be available for contact during the campaign year.   |
| <b>Goal Amount</b>                                | Enter the amount to receive from constituents who share a particular constituent type.<br><br>Goals can be set by constituent type for each campaign year. |
| <b>Nbr Donors</b> (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**).

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.

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Department</b>       | 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. |
| <b>Goal Amount</b>      | 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**).

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.

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Unit Code</b>        | Select a unit code from the available options.  |
| <b>Goal Amount</b>      | 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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>  |
|------------------|------------------------|--|---|
| Prospect List    | AV_CMPGN_PROSPECTS     | <b>Contributor Relations &gt; Initiatives &gt; Campaign Initiatives &gt; Prospect List</b> | 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 <b>Details</b> 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](#)

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## Generating the Campaign Progress Report

This section discusses how to generate campaign progress reports.

### Page Used to Generate the Campaign Progress Report

| <i>Page Name</i>         | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|--------------------------|------------------------|--|--|
| Campaign Progress Report | AV_RUNCTL_CAMPR        | <b>Contributor Relations &gt; CR Reports &gt; Giving Reports &gt; Campaign Progress Report</b> | 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**).

| <i>Field or Control</i>          | <i>Description</i>   |
|----------------------------------|--|
| <b>Institution</b>               | Select the institution for which to generate a report.   |
| <b>Campaign</b>                  | Select the campaign for which to view progress. Campaigns are broad fund-raising efforts at your institution.  |
| <b>Include Related Campaigns</b> | <p>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.</p> <p><i>Example:</i> 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.</p> <p>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.</p> |

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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|------------------|------------------------|--|--|
| Top Donors       | AV_CMPGN_TTG_LIST      | <b>Contributor Relations &gt; Initiatives &gt; Campaign Initiatives &gt; Top Campaign Donors</b> | 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

| <i>Page Name</i>  | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|-------------------|------------------------|---|--|
| Campaign Summary  | AV_CMPGN_SUMMARY       | <b>Contributor Relations &gt; Initiatives &gt; Campaign Initiatives &gt; Campaign Summary</b> | View a summary of all the campaigns at your institution. |
| Initiative Detail | AV_INTV_DTL_SP         | Click the <b>Details</b> 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.

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Details</b>          | 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).

| <b>Field or Control</b>                                | <b>Description</b>  |
|--|---|
| <b>Sub-Goals Defined</b>                               | Indicates that sub-goals have been defined for this initiative.   |
| <b>Audience Defined</b>                                | Indicates that an audience has been defined for this initiative on the Audience page.                                   |
| <b>Resources Defined</b>                               | Indicates that resources have been assigned to this initiative on the Resources page.                                   |
| <b>Related CMP Intv</b> (related campaign initiative)  | Indicates that a campaign initiative has been linked to this initiative on the Related Initiatives page.                |
| <b>Related MBR Intv</b> (related member initiative)    | Indicates that a membership initiative has been linked to this initiative on the Related Initiatives page.              |
| <b>Related VOL Intv</b> (related volunteer initiative) | Indicates that a volunteer initiative has been linked to this initiative on the Related Initiatives page.               |
| <b>Related EVT Intv</b> (related event initiative)     | Indicates that an event initiative has been linked to this initiative on the Related Initiatives page.                  |
| <b>Related OTH Intv</b> (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

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## 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

| <i>Field or Control</i>               | <i>Description</i>   |
|---------------------------------------|--|
| <b>ID Type</b>                        | Identify the constituent as a <i>Person</i> or an <i>Organization</i> .  |
| <b>ID/Org ID</b> (ID/organization ID) | Enter the ID of the constituent (either a person or an organization) or the person assigned to a task.   |
| <b>Add Mbr</b> (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.<br><br>If adjusting memberships, click to access the Membership Adjustment Summary page, where you can select another membership payment number for adjustment. |
| <b>Add Desig</b> (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](#)

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# 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](#).

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# 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

| <i>Page Name</i>    | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|---------------------|------------------------|---|--|
| Member Organization | AV_MBR_ORG             | <b>Contributor Relations &gt; Member Organizations &gt; Manage Member Organizations &gt; Member Organization &gt; Member Organization</b> | Begin the process of defining a member organization at your institution.   |
| Member Criteria     | AV_MBR_CRIT            | <b>Contributor Relations &gt; Member Organizations &gt; Manage Member Organizations &gt; Member Organization &gt; Member Criteria</b>     | Specify the audiences that qualify for membership in a member organization if dues are not required.                 |
| Member Objectives   | AV_MBR_OBJ             | <b>Contributor Relations &gt; Member Organizations &gt; Manage Member Organizations &gt; Member Organization &gt; Member Objectives</b>   | Define the aims of the member organization in terms of advancing your institution.                                   |
| Member Dues         | AV_MBR_DUES            | <b>Contributor Relations &gt; Member Organizations &gt; Manage Member Organizations &gt; Member Organization &gt; Member Dues</b>         | Define the dues, levels, designations, and benefits for member organizations that require payment of dues.           |
| Member Resources    | AV_MBR_RESOURCES       | <b>Contributor Relations &gt; Member Organizations &gt; Manage Member Organizations &gt; Member Organization &gt; Member Resources</b>    | 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**).

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.

Member Organization
Member Criteria
Member Objectives
Member Dues
Member Resources

**Business Unit:** PSUNV      **Mbr Org:** FINE ARTS      **Institution:** PSUNV

**Mbr Org Name:**

**Mission:**

**Start Date:**  BT      **Reporting Level:**

**End Date:**  BT      **\*Club Classification:**

**Campus:**  🔍      **\*Charter Status:**

**Parent Club:**  🔍 Alumni Association      **Parent Level:** 1

**Responsible Person** Find | View All | First | 1 of 1 | Last

**\*ID**  🔍 Capozzelli, Mario + -

Allow Comp Memberships     
  Membership Dues Required     
  Membership Resets Each Year     
 Month:

| <i>Field or Control</i>                        | <i>Description</i>   |
|--|--|
| <b>Mbr Org Name</b> (member organization name) | Enter the formal name of the organization, up to 60 characters.  |
| <b>Mission</b>                                 | Enter the member organization's mission, which describes the history and purpose of the member organization. This is a free-form text field.   |
| <b>Reporting Level</b>                         | 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.  |
| <b>Club Classification</b>                     | Identify the member organization as a <i>Chapter</i> , <i>Alumni Association</i> , <i>Constituent Society</i> , or other classification. Your institution can define club classifications in the translate table record. |
| <b>Charter Status</b>                          | Indicate whether the club has been approved as a full chartered member organization for your institution.  |

| <b>Field or Control</b>   | <b>Description</b>   |
|---|--|
| <b>Allow Comp Memberships</b> (allow complimentary memberships) | <p>Select to enable the ability to grant constituents complimentary membership in this member organization. In some cases, you may add constituents as a member of an organization although they do not meet the audience criteria for membership or they are not expected to pay membership dues. For example, a constituent may be a very active volunteer and you want to bestow a complimentary association membership.</p> <p>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.</p> |
| <b>Membership Dues Required</b>                                 | <p>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.</p>   |
| <b>Membership Resets Each Year</b>                              | <p>Select if annual membership in the organization is based on a set calendar beginning the same month each year.</p>  |
| <b>Month</b>  | <p>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 <b>Membership Resets Each Year</b> check box, this field is required. If not, this field is inactive.</p>  |

## Setting Member Criteria

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

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.

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Audience Detail</b>  | 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**).

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.

|  |  |  |  |                           |  |                          |  |                  |  |
|--|--|--|--|---------------------------|--|--------------------------|--|------------------|--|
| Member Organization  |  | Member Criteria  |  | <b>Member Objectives</b>  |  | Member Dues              |  | Member Resources |  |
| <b>Business Unit:</b> PSUNV  |  |  |  | <b>Institution:</b> PSUNV |  |                          |  |                  |  |
| <b>Mbr Org:</b> FINE ARTS  |  | Fine Arts Constituent Society  |  |                           |  |                          |  |                  |  |
| <b>Mission:</b>  |  | Engage Fine Arts alumni in activities of the University and the Art Department |  |                           |  |                          |  |                  |  |
| <b>Objectives</b> <span style="float: right;">Find   View All   First 1 of 1 Last</span> |  |  |  |                           |  |                          |  |                  |  |
| <b>Objective:</b>  |  | <input type="text"/>   |  |                           |  |                          |  |                  |  |
| <b>*Start Date:</b>  |  | 01/01/2004   |  | <b>End Date:</b>          |  | 01/01/2005               |  |                  |  |
| <b>*Goal Type:</b>   |  | PART   |  | % Participation           |  | <b>Amount/Pct/Total:</b> |  | 75.00            |  |

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

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Objective</b>        | 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**).

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.

The screenshot shows the 'Member Dues' page with the following sections:

- Business Unit:** PSUNV
- Institution:** PSUNV
- Mbr Org:** FINE ARTS (Fine Arts Constituent Society)
- Dues Detail:** Fields for \*Dues Level, \*Description, \*Membership Type, and \*Mbrshp Category.
- Dues Amount:** Fields for \*Effective Date (06/25/2004), \*Status (Active), \*Total Amount, \*Payment Amount, \*Duration (12), and \*Payment Years (1).
- Dues Designation:** Fields for \*BU (PSUNV), \*Designation, \*Initiative, \*Designation Amt, and Gift.
- Dues Benefits:** Fields for Standard Benefit, Item Value (0.00), and 1st.

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.

| <b>Field or Control</b>                      | <b>Description</b>  |
|--|---|
| <b>Dues Level and Description</b>            | Enter the dues level and a longer, more informative description.  |
| <b>Membership Type</b>                       | Indicate whether dues are <i>Annual Membership</i> , <i>Sustaining</i> , <i>Lifetime Membership</i> , or some other value that is defined by your institution. <i>Life</i> is a delivered value and should not be deleted. Use <i>Life</i> to designate any lifetime (nonexpiring) membership.<br><br>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. |
| <b>Mbrshp Category (membership category)</b> | Indicate whether the dues apply to a <i>Family</i> , <i>Single Person</i> , <i>Couple</i> , 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.<br><br>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.     |

| <b>Field or Control</b>                 | <b>Description</b>  |
|---|---|
| <b>Total Amount</b>                     | Enter the amount that the member must pay to be recognized at this dues level.  |
| <b>Duration</b>                         | Enter the duration of the membership when purchased for this amount. This field populates by default to <i>12 Months</i> . If the membership type is <i>Life Member</i> , the system ignores duration on the Membership Entry page. |
| <b>Payment Amount and Payment Years</b> | 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

| <b>Field or Control</b>                     | <b>Description</b>   |
|---|--|
| <b>BU (business unit)</b>                   | <p>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 <b>Designation</b> prompt dialog box change to display the values that you defined for this business unit's setID.</p> <hr/> <p><b>Note:</b> If you have already selected a designation and then change the business unit, you must select a designation again.</p> <hr/> |
| <b>Designation</b>                          | <p>Select the funds at your institution to which memberships and donations can be allocated.</p> <p>The available values for each row include the designations that you defined for that business unit's setID.</p>  |
| <b>Initiative</b>                           | Select the membership or campaign initiative to which you want to assign member dues.  |
| <b>Designation Amt (designation amount)</b> | Enter the amount or portion of the dues payment to be allocated to each designation.   |

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Gift</b>             | <p>When a portion of the dues is also a charitable contribution, select the designation that receives the contribution.</p> <p>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.</p> <hr/> <p><b>Important!</b> You must allocate exact portions of gift and nongift monies of the total dues amount.</p> <hr/> |

### Dues Benefits

| <i>Field or Control</i>                | <i>Description</i>   |
|--|--|
| <b>Standard Benefit and Item Value</b> | <p>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.</p> <p>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.</p> |
| <b>1st (first)</b>                     | <p>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.</p>   |

### Assigning Membership Resources

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

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.

|  |  |                               |  |                              |  |             |  |                         |  |         |  |
|--|--|-------------------------------|--|------------------------------|--|-------------|--|-------------------------|--|---------|--|
| Member Organization  |  | Member Criteria               |  | Member Objectives            |  | Member Dues |  | <b>Member Resources</b> |  |         |  |
| <b>Business Unit:</b> PSUNV  |  |                               |  | <b>Institution:</b> PSUNV    |  |             |  |                         |  |         |  |
| <b>Mbr Org:</b> FINE ARTS  |  | Fine Arts Constituent Society |  |                              |  |             |  |                         |  |         |  |
| <b>Responsible Person</b> <span style="float:right">Find   View All First 1 of 1 Last</span>     |  |                               |  |                              |  |             |  |                         |  |         |  |
| <b>Name:</b> Responsible Mgr:  |  | AV0007                        |  | Whitney, Christopher         |  |             |  |                         |  | + -     |  |
| <b>Start Date:</b> 06/25/2004  |  |                               |  | <b>End Date:</b> 06/25/2005  |  |             |  |                         |  |         |  |
| <b>Responsible Department</b> <span style="float:right">Find   View All First 1 of 1 Last</span> |  |                               |  |                              |  |             |  |                         |  |         |  |
| <b>*Department:</b>  |  | ARTS_SCI                      |  | College of Arts and Sciences |  |             |  |                         |  | + -     |  |
| <b>Start Date:</b> 06/25/2004  |  |                               |  | <b>End Date:</b> 06/25/2005  |  |             |  |                         |  |         |  |
| <b>Responsible Unit</b> <span style="float:right">Find   View All First 1 of 1 Last</span>       |  |                               |  |                              |  |             |  |                         |  |         |  |
| <b>*Unit:</b>  |  | CARSVCS                       |  | Career Services              |  |             |  |                         |  | + -     |  |
| <b>Start Date:</b> 06/25/2004  |  |                               |  | <b>End Date:</b> 06/25/2005  |  |             |  |                         |  |         |  |
| <b>Rsrc Type</b>   |  | <b>Mbr Org Code</b>           |  | <b>Vol Structure:</b>        |  |             |  |                         |  |         |  |
| Mbr Org  |  | FRENCH                        |  |                              |  |             |  |                         |  | New Vol |  |

| <b>Field or Control</b>   | <b>Description</b>   |
|---|--|
| <b>Responsible Mgr</b> (responsible manager)  | Select the responsible person's manager. The manager receives reports and notifications that are related to the member organization.<br><br>The responsible person is defined on the Member Organization page.   |
| <b>Department</b>   | 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.  |
| <b>Unit</b>   | 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. |
| <b>Rsrc Type</b> (resource type)  | To link the member organization with another member organization or an initiative, select either <i>Mbr Org</i> or <i>Initiative</i> . The fields in this row change depending on the selection that you make.   |
| <b>Mbr Org Code</b> (member organization code) and <b>Vol Structure</b> (volunteer structure) | If you selected <i>Mbr Org</i> as a resource type, select the member organization code and the volunteer structure with which it is associated.  |

| <b>Field or Control</b>  | <b>Description</b>  |
|--|---|
| <b>Intv Type</b> (initiative type), <b>Initiative</b> , and <b>Vol Structure</b> (volunteer structure) | If you selected <i>Initiative</i> as a resource type, select the initiative type, initiative, and volunteer structure with which it is associated.  |
| <b>New Vol</b> (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

| <b>Page Name</b>          | <b>Definition Name</b> | <b>Navigation</b>  | <b>Usage</b>  |
|---------------------------|------------------------|--|---|
| Membership Audience Build | AV_RUNCTL_MBR          | <b>Contributor Relations</b> > <b>Member Organizations</b> > <b>Manage Member Organizations</b> > <b>Build Membership Audience</b> | 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.

| <i>Field or Control</i>               | <i>Description</i>   |
|---------------------------------------|--|
| <b>Build Temp Tables</b>              | 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. |
| <b>Merge into Initiative Audience</b> | 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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|------------------|------------------------|---|---|
| Initiative Goals | AV_INTV_MEMBR_GOAL     | <b>Contributor Relations &gt; Initiatives &gt; Membership Initiatives &gt; Membership Goals &gt; Initiative Goals</b> | Set intermediate goals or milestones for an initiative. |

| <b>Page Name</b> | <b>Definition Name</b> | <b>Navigation</b>   | <b>Usage</b>  |
|------------------|------------------------|---|---|
| Annual Goals     | AV_MEMBR_ANNUAL        | <b>Contributor Relations &gt; Initiatives &gt; Membership Initiatives &gt; Membership Goals &gt; Annual Goals</b> | 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**).

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.

The screenshot shows the 'Initiative Goals' page with the following details:

- Membership:** ALUMASSN, 1999 Membership Drive
- Institution:** PSUNV
- Financial Goal:** 0.00 USD
- % Particptn Goal:** 0.00

The 'Intermediate Goals/Milestones' table is displayed with the following data:

| *Target Date | *Goal Type     | Pers/Org | Audience Code | Amount/Pct/Total |
|--------------|----------------|----------|---------------|------------------|
| 06/25/2004   | Nbr of Members | Pers     |               | 5000             |

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

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Target Date</b>      | 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.              |
| <b>Goal Type</b>        | Select the measurement by which you track the goal's progress. Valid goal types are <i>% Income</i> , <i>Financial</i> , <i>% Participation</i> , <i>Number of Donors</i> , and <i>Number of Volunteers</i> . Your institution can define additional goal types. |
| <b>Audience Code</b>    | Select the audience code to which the goal pertains. Available options include all the populations defined with the type of <i>Segmentation</i> 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**).

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.

| <b>Field or Control</b>                                  | <b>Description</b>   |
|--|--|
| <b>Dollar Goal</b>                                       | Enter the monetary amount of the overall goal that you expect to achieve during this membership campaign year from this membership initiative.       |
| <b>Nbr Mbrshps Goal</b> (number of memberships goal)     | Indicates the expected number of memberships to be generated during this membership campaign year from this membership initiative.                   |
| <b>Mbrshp Pct Increase</b> (membership percent increase) | Enter the increase in overall memberships from one year to the next that is expected from this membership initiative.                                |
| <b>Nbr Members Goal</b> (number of members goal)         | Enter the anticipated number of members for this membership campaign year from this membership initiative. This number should include joint members. |
| <b>Mbrs Pct Increase</b> (members percent increase goal) | Enter the anticipated increase in members (including joint members) from one year to the next from this membership initiative.                       |

## Goal Detail

| <i>Field or Control</i>                           | <i>Description</i>   |
|---|--|
| <b>Membership Type</b>                            | Select the membership type for which you want to set a goal. Membership types are defined by your institution, but typically include values such as <i>Annual</i> , <i>Sustaining</i> , <i>Life</i> , and so on. The valid membership types are determined by the setID that is associated with the selected initiative's business unit. |
| <b>Member Status</b>                              | Select the status of the members from which memberships are received, such as <i>New</i> , <i>Lapsed</i> , <i>Renewed</i> , and so on. These values are defined by your institution.   |
| <b>Amount and Nbr Members</b> (number of members) | Enter the monetary goal and the goal for the number of members.  |

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## 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:

|                | <i>Without Joint</i> | <i>With Joint</i> |       |            |       |            |
|----------------|----------------------|-------------------|-------|------------|-------|------------|
| 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

| <i>Field or Control</i>  | <i>Description</i>  |
|--------------------------|---|
| <b>Maintain Sessions</b> | 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

| <i>Page Name</i>                       | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|--|------------------------|--|--|
| Membership Entry                       | AV_MBR_ENTRY           | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Session Management &gt; Enter Memberships &gt; Membership Entry</b></li> <li>• Click the <b>Session Entry</b> link on the Maintain Membership Sessions page.</li> </ul>   | Enter basic information about dues.  |
| Tender Type Detail - Check page        | AV_TENDER_DTL_SP       | Click the <b>Tender Detail</b> 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 <b>Tender Detail</b> 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 <b>What is a security code?</b> link on the Tender Type Detail - Credit Card page.   | Learn more about security codes in credit card transactions.               |
| Designations                           | AV_MBR_ENTRY2          | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Session Management &gt; Enter Memberships &gt; Membership Entry &gt; Designations</b></li> <li>• Click the <b>Session Entry</b> link on the Maintain Membership Sessions page (for adjustment sessions).</li> </ul> | 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**).

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.

The screenshot shows the 'Membership Entry' page with the following details:

- Business Unit:** MEDBU **Session Number:** 197 **Institution:** PSUNV [Maintain Sessions](#)
- Membership Detail** (Find | View All | First 1 of 1 Last)
- ID Type:** Person **ID:** AD1071 **Name:** Shotkin, Matthew **Friend:** Friend [Search](#)
- Carry Transaction** [Add Membership](#)
- Membership Number:** 63
- \*Member Org:** FRENCH French Language Enhancement Program
- Level:** BON  **Complimentary**
- \*Appeal:** CALL Phone Call
- Membership Status:** New
- Membership Type:** Annual Membership
- Membership Category:** Single Membership
- Member Payment Number:** 56
- Dues Amount:** 100.00 USD
- Tender:** CASH Cash
- Total Amount:** 100.00 USD
- Data Entry Date:** 06/14/2006
- Periods:** 1
- Start Date:** 06/14/2006
- Expiration Date:** 12/31/2006
- [Membership History](#)

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:

| <b>Currency Code</b>      | <b>Fields That Appear</b>               | <b>Fields That Disappear</b>            |
|---------------------------|---|---|
| Your business unit's base | None                                    | <b>Display in Other Currency</b> button |
|                           | None                                    | <b>Base Amt</b>                         |
| Any other currency        | <b>Display in Other Currency</b> button | None                                    |
|                           | <b>Base Amt</b>                         | None                                    |

| <b>Field or Control</b>   | <b>Description</b>  |
|---|---|
|    | <p>Click to access the Update Information page to either update an existing member's record or add a new member to the system.</p> <p>Because the <b>ID Type</b> field populates by default to <i>Person</i> 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 <i>Organization</i> from the <b>ID Type</b> field, enter the organization's ID, and then click the <b>Update Record</b> button.</p> <p>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 <i>NEW</i>. If you leave the prompt set to <i>NEW</i>, the system assumes that you are adding a new member and displays the pages for adding or updating a new constituent.</p> |
| <b>Year</b>   | <p>If the member is an alumnus or alumna, the preferred class year appears.</p>   |
| <b>Search</b>   | <p>Click to access the Search/Match page, where you can search for a member.</p> <p>See "Using Search/Match" (Campus Community Fundamentals).</p>   |
|  | <p>Click to paste a carried ID found using Search/Match functionality.</p>  |
| <b>Carry Transaction</b>  | <p>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.</p>  |
| <b>Membership Number</b>  | <p>The membership number is set to <i>New</i> 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.</p> <hr/> <p><b>Note:</b> New membership numbers are assigned based on the last membership number on the CR Installation page.</p>  |

| <b>Field or Control</b>                 | <b>Description</b>   |
|---|--|
| <b>Member Org</b> (member organization) | <p>Select the member organization that the member is joining. The available values for this field include all the member organizations for which the <b>Allow Comp Memberships</b> or <b>Membership Dues Required</b> check boxes are selected on the Member Organization page.</p> <p>When you select a member organization for which the ID is already a member, the <b>Level</b> field is populated by default with the last dues level for the member, the <b>Periods</b> field populates by default to 1, and the <b>Total Amount</b> field populates by default to the dues amount for the current dues level.</p>   |
| <b>Level</b>                            | <p>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.</p> <p>If you are entering transactions in a currency other than base currency, the system populates the <b>Base Amt</b> field (in addition to the <b>Dues Amt</b> and <b>Total Amt</b> 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.</p> |
| <b>Appeal</b>                           | <p>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.</p> <p>The available values include the appeals that you defined for the setID that is associated with the session's business unit.</p>   |
| <b>Complimentary</b>                    | <p>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.</p> <p>If you select this check box, the system hides the <b>Dues Amount</b>, <b>Tender</b>, and <b>Total Amount</b> fields. Additionally, you cannot edit any information on the Designations page.</p>   |

| <b>Field or Control</b>                        | <b>Description</b>  |
|--|---|
| <b>Membership Status</b>                       | <p>This field populates based on the information that the system retrieves when you select a member organization. Values are:</p> <p><i>New:</i> No previous membership exists for the selected member organization.</p> <p><i>Renewed:</i> 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 <b>Membership Days</b> field on the Institution Installation page.</p> <p><i>Reactivated:</i> 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 <b>Membership Days</b> field on the Institution Installation page.</p> |
| <b>Membership Type and Membership Category</b> | <p>These fields appear after you enter payment information. The information in these fields is based on dues level.</p>   |
| <b>Member Payment Number</b>                   | <p>This field populates by default to <i>NEW</i> when you enter a new membership payment. After you save the membership session, the system assigns a number to the transaction.</p>  |
| <b>Dues Amount</b>                             | <p>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.</p> <p>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.</p>   |
| <b>Tender</b>                                  | <p>Select a monetary form in which the payment is received. Examples are <i>Cash</i>, <i>Credit Card</i>, <i>Check</i>, and so on.</p> <p>The available values depend on the values that you set up on the Tender Types page for the business unit's setID.</p>   |

| <b>Field or Control</b>   | <b>Description</b>  |
|---|---|
|  | <p>Depending on the tender type you select, click this button to enter its appropriate details on the Tender Type Detail page:</p> <p>For <i>Check</i>, enter the check number on the page that appears.</p> <p>For <i>Credit Card</i>, enter the constituent's credit card information on the page that appears.</p> <p>If the credit card gift was mass loaded, the system populates address information, based on the <b>Address Type</b> 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.</p> <p>For <i>GIK</i>, enter the constituent's gift-in-kind details on the page that appears.</p> <p>For <i>Security</i>, enter the description and details of the constituent's securities on the page that appears.</p> <p>See <a href="#">Entering Tender Type Details</a>.</p>  |
| <p><b>Periods</b></p>   | <p>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.</p> <hr/> <p><b>Note:</b> 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 <b>Periods</b> field display-only.</p> <hr/>   |
| <p><b>Total Amount</b></p>  | <p>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.</p> <p>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 <b>Amount</b> 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.</p> <hr/> <p><b>Note:</b> If additional gift entries are allowed during a membership session, this amount may be overridden. To allow gifts in membership sessions, the <b>Allow Gifts in Membership</b> check box must be selected on the Institution Installation page.</p> <hr/> |

| <b>Field or Control</b>   | <b>Description</b>   |
|---|--|
| <b>Base Amount</b>  | <p>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.</p> <hr/> <p><b>Note:</b> 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.</p> <hr/>  |
|  | <p>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.</p> <p>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.</p>  |
| <b>Expiration Date</b>  | <p>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.</p> <p>The system uses a different calculation, based on membership status:</p> <p><i>New or Reactivated:</i> Current date plus the duration for the dues code, as established on the Membership Dues page.</p> <p><i>Renewed:</i> The last expiration date plus the duration for the dues code, as established on the Membership Dues page.</p> <p>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.</p> |
| <b>Membership History</b>   | <p>Click to view membership history for this person. The Membership History Prsn page appears.</p> <p>See <a href="#">Viewing Membership History</a>.</p>  |

## 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.

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Check Number</b>     | If you selected <i>Check</i> as the tender on the Membership Entry page, enter the check number. |

| <i>Field or Control</i>         | <i>Description</i>   |
|---------------------------------|--|
| <b>First Name</b>               | 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.  |
| <b>Last Name</b>                | 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.   |
| <b>Organization Name</b>        | If entering a payment for an organization, enter the organization name.  |
| <b>Credit Card Type</b>         | Select the type of credit card that the credit card holder is using. These values are set up on the Credit Card Type page.<br><br>See <a href="#">Defining Credit Card Types</a> .   |
| <b>Credit Card Number</b>       | Enter the credit card holder's card number. The length of the credit card number is established on the Credit Card Type page.  |
| <b>Security Code</b>            | Enter the security code as it appears on the credit card. This field does not appear if the <b>Security Code-Batch</b> check box is cleared on the CR Merchant page.   |
| <b>What is a security code?</b> | 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 <b>Security Code-Batch</b> check box is cleared on the CR Merchant page. |
| <b>Expiration Date</b>          | Enter the expiration month and year as they appear on the credit card.   |

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Email Address</b>    | <p>Enter the email address of the credit card holder, including the full domain name, in the form name@host.domain. For authorization and credit transactions, the third-party processor requires a value in this field. Email addresses are defined on the Electronic Addresses page.</p> <p>If you do not have an email address for the contributor, the system uses the default email address that you define on the CR Merchants page.</p>   |
| <b>OK</b>               | <p>Click to validate any changed information, save, and close the page.</p> <p>If you chose to use the check digit algorithm on the Credit Card Type page, the validation process checks for the appropriate number of digits in the card number. The system also checks for the appropriate prefix for the credit card type and validates the expiration date format, the amount (must be greater than 0 USD), and the address information. If there are any errors on this page, the system returns a message and prompts for corrections.</p> |
| <b>Cancel</b>           | <p>Click to cancel the entry, ignore any changed information, and close the page without saving.</p>   |

For the Tender Type Detail – Gift-in-Kind page:

| <b>Field or Control</b>  | <b>Description</b>   |
|--------------------------|--|
| <b>Gift Description</b>  | <p>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.</p>  |
| <b>Gift Purpose</b>      | <p>Enter the reason for the gift and how it will be used.</p>  |
| <b>Estimated Value</b>   | <p>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 accurately declare the gift's value.</p> |
| <b>Written Appraisal</b> | <p>Select this check box when a written appraisal is received with the gift-in-kind.</p>   |
| <b>Appraised Value</b>   | <p>Enter the valued amount of the gift-in-kind, as determined by an external appraiser.</p>  |
| <b>Appraisal Date</b>    | <p>Enter the date that the appraisal was made.</p>   |

For the Tender Type Detail - Securities page, Security Information 1 tab:

| <b>Field or Control</b>               | <b>Description</b>  |
|---------------------------------------|---|
| <b>Gift Description</b>               | Enter a brief description of the security to be incorporated into the AVAK LetterGen.SQC so that it can be used in an acknowledgement.  |
| <b>Stock/Security Name and Symbol</b> | Enter the name and trading symbol for the company whose stock has been given.   |
| <b>Number of Shares</b>               | Enter the number of shares of the stock or security being transferred to the institution as a gift.   |
| <b>Estimated Value</b>                | 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:

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Day Low/Ask</b>      | 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.  |
| <b>Day High/Bid</b>     | 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. |
| <b>Public</b>           | 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**).

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

The screenshot shows the 'Designations' page for a membership entry. At the top, it displays 'Business Unit: PSUNV', 'Session Number: 151', and 'Institution: PSUNV'. Below this is the 'Membership Detail' section, showing 'Member Payment Number: NEW', 'ID: AV0007', and the member's name 'Whitley, Christopher'. A yellow 'Add Membership' button is visible. The 'Designation Total' section shows 'Percent: 25.0000', 'Amount: 25.00 USD', 'Level: ANNL', and 'Total Amount: 100.00'. The 'Designation Detail' section contains a table with columns for Business Unit, Designation, Initiative, Appeal, and Amount. The current row shows 'PSUNV', 'ALUMNIANNL', 'ALUMASSN', 'CALL', and '25.00'. A yellow 'Add Designation' button and a minus sign are next to the amount field. Below the table is the text 'Alumni Assn Annual Memberships'. At the bottom, the 'Joint Records' section has fields for '\*ID Type' (set to 'Person'), 'ID', and '\*Member Type'.

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.

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Business Unit</b>    | <p>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.</p> <p>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.</p> <p>If you have already selected a designation and appeal, and then change the business unit, you must select a designation and appeal again.</p> |

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Designation</b>      | <p>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.</p> <p>If you are adding a designation, the available values are those designations that you defined for the business unit's setID.</p>   |
| <b>Initiative</b>       | <p>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.</p>  |
| <b>Appeal</b>           | <p>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.</p> <p>If you are adding a designation row, the available values include the appeals that you defined for the business unit's setID.</p> |
| <b>Amount</b>           | <p>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.</p>  |

## Joint Records

| <b>Field or Control</b>   | <b>Description</b>   |
|---|--|
|  | <p>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.</p> <p>Because the <b>ID Type</b> field populates by default to <i>Person</i> 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 <i>Organization</i> from the ID type field, enter the organization's ID, and then click the <b>Update Record</b> button.</p> <p>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 <i>NEW</i>. If you leave the prompt set to <i>NEW</i>, the system assumes that you are adding a new member and displays the pages for adding or updating a new constituent.</p> |
| <b>Member Type</b>  | <p>If the membership is <i>Joint</i>, a <i>Gift</i>, or a <i>Referral</i>, select the appropriate option. Gift and referral records are stored only for reference, to be used in audience criteria or in reports.</p>  |

### 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.

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**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.

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## Pages Used to Adjust Membership Dues Payments

| <i>Page Name</i>      | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|-----------------------|------------------------|---|---|
| Member Adjust Summary | AV_ADJ_MBR_SMRY        | <b>Contributor Relations</b> ><br><b>Session Management</b> ><br><b>Enter Memberships</b> ><br><b>Membership Adjustment</b> ><br><b>Member Adjust Summary</b> | Select the membership transactions to adjust in this adjustment session.  |
| Member Adjust         | AV_ADJ_MBR             | <b>Contributor Relations</b> ><br><b>Session Management</b> ><br><b>Enter Memberships</b> ><br><b>Membership Adjustment</b> ><br><b>Member Adjust</b>         | Make adjustments to an existing membership transaction that you selected on the Membership Adjustment Summary page. |
| Designation Adjust    | AV_MBR_ENTRY2          | <b>Contributor Relations</b> ><br><b>Session Management</b> ><br><b>Enter Memberships</b> ><br><b>Membership Adjustment</b> ><br><b>Designation Adjust</b>    | 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**).

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 Adjust Summary
Member Adjust
Designation Adjust

**Business Unit:** PSUNV    **Session Number:** 160    **Institution:** PSUNV    [Maintain Sessions](#)

Adjust Member Payment

**ID Type:** Person    **ID:**    
**Member Payment Number:**

Adjusted Member Payments

Customize | Find | View All | 
First 1 of 1 Last

| Member Payment Number | ID     | Constituent      | Membership Organization | Level | Dues Amount | Total Amount |     |
|-----------------------|--------|------------------|-------------------------|-------|-------------|--------------|-----|
| 53                    | AV0001 | Gallegher, Shawn | ALUMASSN                | ANNL  | 25.00       | 25.00        | USD |

| <i>Field or Control</i>      | <i>Description</i>   |
|------------------------------|--|
| <b>Member Payment Number</b> | Enter the original number for the transaction to adjust. Available values include the existing posted membership payments for the ID that you select.<br><br><b>Note:</b> 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.

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Add Adjustment</b>   | 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**).

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.

| Member Adjust Summary   |                  | Member Adjust          |   | Designation Adjust  |   |
|---|------------------|------------------------|---|---------------------|---|
| <b>Business Unit:</b>   | PSUNV            | <b>Session Number:</b> | 160   | <b>Institution:</b> | PSUNV <a href="#">Maintain Sessions</a>                               |
| <b>Membership Detail</b> <span style="float: right;">Find   View All   First 1 of 1 Last</span> |                  |                        |   |                     |   |
| <b>ID:</b>  | AV0001           | Gallegher,Shawn        | Alumni  | 2001                | <input type="checkbox"/> <b>Refund</b> <a href="#">Add Membership</a> |
| <b>*Reason:</b>   | Data entry error |                        |   |                     |   |
| <b>Membership Number:</b>   | 53               |                        | <b>Membership Status:</b> New                 |                     |   |
| <b>*Member Org:</b>   | ALUMASSN         | Alumni Association     | <b>Membership Type:</b> Annual Membership     |                     |   |
| <b>Level:</b>   | ANNL             |                        | <b>Membership Category:</b> Single Membership |                     |   |
| <b>*Appeal:</b>   | CALL             | Phone Call             | <b>Member Payment Number:</b> 53              |                     |   |
| <b>Dues Amount:</b>   | 25.00            | USD                    | <b>Data Entry Date:</b>                       | 11/05/2004          |   |
| <b>Tender:</b>  | CHK              | Check                  | <b>Periods:</b>                               | 1                   |   |
| <b>Total Amount:</b>  | 25.00            | USD                    | <b>Start Date:</b>                            | 11/05/2004          |   |
|   |                  |                        | <b>Expiration Date:</b>                       | 11/05/2005          |   |
| <a href="#">Membership History</a>  |                  |                        |   |                     |   |

**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.

| <i>Field or Control</i>  | <i>Description</i>   |
|--------------------------|--|
| <b>Refund</b>            | Select if the adjustment results in a refund to the member.  |
| <b>Membership Number</b> | 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. |
| <b>Expiration Date</b>   | 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**).

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.

| Member Adjust Summary  |                      | Member Adjust                 |                           | Designation Adjust  |  |
|--|----------------------|-------------------------------|---------------------------|---|--|
| <b>Business Unit:</b>  | PSUNV                | <b>Session Number:</b>        | 160                       | <b>Institution:</b>   | PSUNV <a href="#">Maintain Sessions</a>                          |
| <b>Membership Detail</b> <span style="float: right;">Find   View All   First 1 of 1 Last</span>  |                      |                               |                           |   |  |
| <b>Member Payment Number:</b>  | 53                   | <b>ID:</b>                    | AV0001                    | Gallegher, Shawn <a href="#">Add Membership</a>                   |  |
| <b>Designation Total</b>   |                      |                               |                           |   |  |
| <b>Percent:</b>  | 100.0000             | <b>Amount:</b>                | 25.00 USD                 | <b>Level:</b>   | ANNL <b>Total Amount:</b> 25.00                                  |
| <b>Designation Detail</b> <span style="float: right;">Find   View All   First 1 of 1 Last</span> |                      |                               |                           |   |  |
| <b>Business Unit</b>   | <b>Designation</b>   | <b>Initiative</b>             | <b>Appeal</b>             | <b>Amount</b>   |  |
| PSUNV  | ALUMNIANNL           | ALUMASSN <input type="text"/> | CALL <input type="text"/> | 25.00   | <a href="#">Add Designation</a> <input type="button" value="-"/> |
| Alumni Assn Annual Memberships   |                      |                               |                           |   |  |
| <b>Joint Records</b> <span style="float: right;">Find   View All   First 1 of 1 Last</span>      |                      |                               |                           |   |  |
| <b>*ID Type</b>  | <b>ID</b>            | <b>*Member Type</b>           |                           |   |  |
| <input type="checkbox"/> <input type="text" value="Person"/>                                     | <input type="text"/> | <input type="text"/>          |                           | <input type="button" value="+"/> <input type="button" value="-"/> |  |

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

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Percent</b>          | <p>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.</p> <p>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.</p> |
| <b>Amount</b>           | Displays the amount of the total membership dues or gift amount that has been allocated to designations.  |

## Designation Detail

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Business Unit</b>    | <p>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.</p> <p>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 <b>Designation</b> and <b>Appeal</b> fields change to display the values that you defined for the business unit's setID.</p> <p>If you have already selected a designation and appeal, and then change the business unit, your selections are backed out.</p> |

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Designation</b>      | <p>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.</p> <p>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.</p> <p>If you select a new designation, the available values are the designations that you defined for the business unit's setID.</p>  |
| <b>Initiative</b>       | <p>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.</p>   |
| <b>Appeal</b>           | <p>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.</p> <p>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.</p> <p>If you select a new appeal, the available values include the appeals that you defined for the business unit's setID.</p> |
| <b>Amount</b>           | <p>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.</p> <p>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.</p>  |

## Joint Records

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Member Type</b>      | Make any necessary changes to the <b>Membership Type</b> field to indicate whether the membership is <i>Joint</i> , a <i>Gift</i> , or a <i>Referral</i> . |

### 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" (Campus Community Fundamentals)

[Understanding the Membership Mass Change Template](#)

## Viewing Membership Progress

This section discusses how to view membership progress.

## Page Used to View Membership Progress

| <i>Page Name</i>    | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|---------------------|------------------------|---|---|
| Membership Progress | AV_MEMBR_PROGRESS      | <b>Contributor Relations &gt; Initiatives &gt; Membership Initiatives &gt; Membership Initiative Progress</b> | View aggregated information of a membership initiative. |

## Viewing Membership Progress

Access the Membership Progress page (**Contributor Relations > Initiatives > Membership Initiatives > Membership Initiative Progress**).

| <i>Field or Control</i>                                | <i>Description</i>  |
|--|---|
| <b>Financial Goal</b>                                  | Displays the overall revenue goal for the membership initiative.  |
| <b>Total to Date</b>                                   | Displays the sum of all the dues amounts received for the initiative.   |
| <b>Pct of Goal</b> (percent of goal)                   | Displays the result of the total to date divided by the financial goal.   |
| <b>Nbr Memberships</b> (number of memberships)         | <p>Displays the total number of memberships received to date. This field calculates only membership payments.</p> <hr/> <p><b>Note:</b> This field includes each actual membership, regardless of how many members it represents.</p> <hr/> |
| <b>Nbr Members</b> (number of members)                 | Displays the total number of memberships received to date including joint members.  |
| <b>Nbr New Members</b> (number of new members)         | Displays the number of members who are paying membership dues for the first time.   |
| <b>Nbr Renew Mbrs</b> (number of renewal members)      | Displays the number of members who are paying membership dues as a renewal of a current membership.   |
| <b>Nbr React Mbrs</b> (number of reactivating members) | Displays the number of members who are reinstating membership after it has lapsed for at least one year.  |
| <b>Nbr Life Mbrs</b> (number of lifetime members)      | Displays the number of new lifetime members brought in by this membership initiative.   |

| <i>Field or Control</i>                          | <i>Description</i>   |
|--|--|
| <b>Total Budget</b>                              | Displays the total expense budget for management of this membership initiative.                |
| <b>Expenses to Date</b>                          | 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

| <i>Page Name</i>                                       | <i>Definition Name</i>                                   | <i>Navigation</i>  | <i>Usage</i>   |
|--|--|--|--|
| Membership History Prsn<br>(membership history person) | AV_MBR_HSTRY_INQ<br>AV_MBR_HST_E_INQ<br>AV_MBR_HISTORY_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Member Organizations &gt; Membership History &gt; Membership History</b></li> <li>• <b>Contributor Relations &gt; Member Organizations &gt; Membership History &gt; Membership History - Org</b></li> <li>• <b>Contributor Relations &gt; Member Organizations &gt; Membership History &gt; Membership History - Workset</b></li> </ul> | View information about a member's past participation in member organizations defined at your institution. The Membership Detail portion of the page appears only after you select a membership organization. |
| Membership Detail                                      | AV_MBR_DTL_INQ_SP  | Click a <b>Membership Organization</b> link on the Membership History page.  | View detailed information about a specific membership entry.   |
| Membership Detail - Designation                        | AV_MBR_DTL_INQ2_SP                                       | Click the <b>Designation</b> 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

| <i>Page Name</i> | <i>Definition Name</i>                                       | <i>Navigation</i>  | <i>Usage</i>   |
|------------------|--|--|--|
| Benefits History | AV_MBR_BNFT_HIST<br>AV_MBR_BNFT_HIST_E<br>AV_MBR_BNFT_HIST_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Member Organizations &gt; Membership Benefit Summary &gt; View Member Benefits</b></li> <li>• <b>Contributor Relations &gt; Member Organizations &gt; Membership Benefit Summary &gt; View Member Benefits - Org</b></li> <li>• <b>Contributor Relations &gt; Member Organizations &gt; Membership Benefit Summary &gt; View Member Benefits - Workset</b></li> </ul> | 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

| <i>Page Name</i>                                  | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|---|------------------------|---|--|
| Membership Summary, Supervisor Membership Summary | AV_MBRSHP_SMRY         | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Session Management &gt; Supervise Sessions &gt; Membership Sessions &gt; Membership Session Summary</b></li> <li>• <b>Contributor Relations &gt; Session Management &gt; Supervise Sessions &gt; Membership Sessions &gt; Supervisor Membership Summary</b></li> </ul> | 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

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## 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](#)

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## 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 [Understanding Initiative Management](#).

## 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

[Assigning Volunteers to Specific Tasks](#)

## Pages Used to Assign Volunteers to Roles

| <i>Page Name</i>            | <i>Definition Name</i>                 | <i>Navigation</i>  | <i>Usage</i>  |
|-----------------------------|--|--|---|
| Volunteer Group Assignments | AV_VOL_GRP1_ASGN<br>AV_VOL_GRP1_ASGN_M | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Initiative Leadership &gt; Volunteer Group Assignments</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Membership Org Volunteers &gt; Member Organization Leadership &gt; Volunteer Group Assignments</b></li> </ul> | 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<br>AV_VOL_GRP2_ASGN_M | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Initiative Leadership &gt; Sub-Group Assignments</b></li> <li>• <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Membership Org Volunteers &gt; Member Organization Leadership &gt; Sub-Group Assignments</b></li> </ul>             | 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.

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.

The screenshot shows the 'Volunteer Group Assignments' page with the following details:

- Initiative:** ANNFUND
- Intv Type:** CAMPAIGN
- Institution:** PSUNV
- Description:** Annual Fund Campaign
- Leadership Group:** annfund group
- Effective Date:** 01/24/2001
- Status:** Active
- Role:** Vice-Chairperson
- Term Length:** 1 Yr.
- Required:**

A table below shows the assignment details:

| Volunteer ID | *Start Date | End Date   |               |
|--------------|-------------|------------|---------------|
| 1 AV0008     | 01/01/2004  | 01/01/2005 | Carroll,James |

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.

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.

The screenshot shows the 'Sub-Group Assignments' page. At the top, there are tabs for 'Volunteer Group Assignments' and 'Sub-Group Assignments'. Below the tabs, there are filter fields: Initiative: ANNFUND, Intv Type: CAMPAIGN, Institution: PSUNV, and Description: Annual Fund Campaign. A table is displayed with columns for 'Volunteer ID', '\*Start Date', and 'End Date'. The table has one row with the value '1' in the 'Volunteer ID' column. There are also search and navigation controls like 'Find | View All' and 'First 1 of 1 Last'.

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<br>AV_VOL_ASGN1_M | <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Initiative Volunteers &gt; Volunteer Assignments &gt; Volunteer Assignments 1</b> | Begin the process of assigning individuals and volunteer groups to specific tasks.    |
| Volunteer Assignments 2 | AV_VOL_ASGN2<br>AV_VOL_ASGN2_M | <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Initiative Volunteers &gt; Volunteer Assignments &gt; Volunteer Assignments 2</b> | 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.

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 Assignments 1
Volunteer Assignments 2

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

**Description:** College of Business Campaign

Find | View All
First
1 of 1
Last

**Volunteer ID:**  Gallegher,Shawn

**Volunteer Group:**

Find | View All
First
1 of 1
Last

**Start Date:**   Carry Transaction

**End Date:**

**Assignment Type:**  Legislative

**Area of Responsibility:**  Congress Members

---

**Volunteer Mgr:**  Crosbie,Edward

| <b>Field or Control</b>                  | <b>Description</b>  |
|--|---|
| <b>Volunteer ID and Volunteer Group</b>  | Enter the volunteer ID of the individual or the volunteer group that you are assigning.   |
| <b>Assignment Type</b>                   | Enter an assignment type. The values <i>Student Recruitment</i> , <i>Career Services</i> , and <i>Legislative</i> are shipped with the system, but your institution can define additional values.   |
| <b>Area of Responsibility</b>            | 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.                                       |
| <b>Carry Transaction</b>                 | 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 <b>Start Date</b> , <b>Assignment Type</b> , <b>Area of Responsibility</b> , and <b>Volunteer Manager</b> carry to subsequent transactions. |
| <b>Volunteer Mgr</b> (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.

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.

The screenshot shows the 'Volunteer Assignments 2' page with the following details:

- Initiative:** BUSINESS
- Intv Type:** CAMPAIGN
- Institution:** PSUNV
- Description:** College of Business Campaign
- Volunteer ID:** (Empty field)
- Volunteer Group:** (Empty field)
- Start Date:** (Empty field)
- Assignment Type:** (Empty field)
- End Date:** (Empty field)
- Area of Responsibility:** (Empty field)
- \*ID:** AV0002
- Name:** Isenberg, Robin
- \*Contact Type:** LETTER
- Letter:** (Text label)
- Completed:**
- Effectiveness Rating:** Good
- Assign Again:**
- Potential Leader:**
- Future:** (Empty text area)

| <b>Field or Control</b>     | <b>Description</b>   |
|-----------------------------|--|
| <b>ID</b>                   | Enter the ID of the constituent the volunteer is to contact. The person's name appears to the right of this field.   |
| <b>Contact Type</b>         | 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. |
| <b>Completed</b>            | Select when the contact with the volunteer is complete.  |
| <b>Effectiveness Rating</b> | Record a volunteer's performance on a limited basis. Valid ratings are <i>Excellent</i> , <i>Good</i> , <i>Fair</i> , and <i>Poor</i> .  |
| <b>Assign Again</b>         | Select to assign the volunteer again in the future.  |
| <b>Potential Leader</b>     | Select if the volunteer has demonstrated potential as a leader.  |
| <b>Future</b>               | 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

[Tracking Prospect Data](#)

[Contributor Relations Reports: Selected Reports](#)

## Reviewing Volunteer History

This section discusses how to review volunteer history information.

### Pages Used to View Volunteer History

| <i>Page Name</i>  | <i>Definition Name</i>       | <i>Navigation</i>  | <i>Usage</i>  |
|-------------------|------------------------------|--|---|
| Volunteer History | AV_VOL_HIST<br>AV_VOL_HIST_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Initiatives &gt; Volunteer Initiatives &gt; Volunteer History</b></li> <li>• <b>Contributor Relations &gt; Constituent Information &gt; Workset &gt; Volunteer History</b></li> </ul> | Review information about a particular volunteer's past involvement at your institution. |

| <i>Page Name</i>            | <i>Definition Name</i>               | <i>Navigation</i>  | <i>Usage</i>  |
|-----------------------------|--------------------------------------|--|---|
| Person Profile              | AV_PRSN_PROFILE<br>AV_PRSN_PROFILE_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Constituent Information &gt; People &gt; Person Profile</b></li> <li>• <b>Contributor Relations &gt; Constituent Information &gt; Workset &gt; Workset Constituent Info &gt; Person Profile - Workset</b></li> <li>• Self Service, Outreach, View Person Information, Constituent Information, Person Profile</li> <li>• <b>Self Service &gt; Outreach &gt; View Lists &gt; Person Profile</b></li> </ul> | 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                       | <ul style="list-style-type: none"> <li>• Click the linked name of a Volunteer Role on the Volunteer History inquiry page.</li> <li>• Click the linked name of a Volunteer Role on the Person Profile inquiry page.</li> </ul>  | Review detailed information about a volunteer's activity.   |
| Audience History            | AV_AUD_HISTORY                       | <b>Contributor Relations &gt; Constituent Information &gt; People &gt; Participation &gt; Audience History</b>   | 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**).

| <i>Field or Control</i>                        | <i>Description</i>  |
|--|---|
| <b>Search</b>                                  | Click to return all volunteer history records that fall within the time frame you selected. |
| <b>Volunteer Group and Volunteer Sub Group</b> | These columns display the group or subgroup to which the volunteer belongs.                 |

| <b><i>Field or Control</i></b> | <b><i>Description</i></b>  |
|--------------------------------|--|
| <b>Volunteer Role</b>          | 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, see [Understanding 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" (Campus Community Fundamentals)
- [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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>                                       |
|------------------|------------------------|---|--|
| Event Goals      | AV_INTV_EVNT_GOAL      | <b>Contributor Relations &gt; Initiatives &gt; Event Initiatives &gt; Manage Event Initiatives &gt; Event Goals</b> | 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.

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Target Date</b>      | Enter the date by which the goal may be reached.   |
| <b>Goal Type</b>        | Select the measurement by which you track the goal's progress. Valid goal types are <i>% Income</i> , <i>Financial</i> , <i>% Participation</i> , <i>Number of Donors</i> , and <i>Number of Volunteers</i> . Your institution can define additional goal types. |
| <b>Audience Code</b>    | Enter the audience code to which the goal pertains. The field contains a list of all the populations defined by your institution with the type of <i>Segmentation</i> for this initiative on the Audience page.  |
| <b>Amount/Pct/Total</b> | 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" (Campus Community Fundamentals)

"Creating an Event" (Campus Community Fundamentals)

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## 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" (Campus Community Fundamentals)

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## 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" (Campus Community Fundamentals)

---

## 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" (Campus Community Fundamentals)

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## 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" (Campus Community Fundamentals)

## 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](#)

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## 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 | <b>Contributor Relations &gt; Initiatives &gt; Other Initiatives &gt; Manage Other Initiatives &gt; Other Initiative Goals</b> | 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**).

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.

### Other Initiative Goals

**Initiative:** MERGERS    **Intv Type:** OTHER    **Institution:** PSUNV  
**Initiative Name:** Miami Mergers

**Financial Goal:** 0.00USD    **% Particptn Goal:** 0.00

| Intermediate Goals/Milestones |                 |          |               |                  | Find   View All | First | 1-6 of 7 | Last |
|-------------------------------|-----------------|----------|---------------|------------------|-----------------|-------|----------|------|
| *Target Date                  | *Goal Type      | Pers/Org | Audience Code | Amount/Pct/Total |                 |       |          |      |
| 10/30/1999                    | Attendance      | Pers     | CLASS 49      | 250              | + -             |       |          |      |
| 06/30/1999                    | Average Gift    |          |               | 100.00           | + -             |       |          |      |
| 06/30/1999                    | Number Donors   | Pers     | CLASS 49      | 20               | + -             |       |          |      |
| 07/01/1999                    | Financial       | Pers     | CLASS 89      | 1,000.00         | + -             |       |          |      |
| 06/30/1999                    | Financial       |          |               | 100,000.00       | + -             |       |          |      |
| 12/31/1998                    | % Participation | Pers     | CLASS 89      | 10.00            | + -             |       |          |      |

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.

| <b><i>Field or Control</i></b> | <b><i>Description</i></b>  |
|--------------------------------|--|
| <b>Target Date</b>             | Enter the date by which the goal may be reached.   |
| <b>Goal Type</b>               | Select the measurement by which you track the goal's progress.   |
| <b>Audience Code</b>           | Enter the audience code to which the goal pertains. Available options include all the populations defined for this initiative with the type of <i>Segmentation</i> on the Audience page. |

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## 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

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## 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

| <i>Field or Control</i> | <i>Description</i>                                       |
|-------------------------|--|
| <b>ID Type</b>          | Select whether the donor is a person or an organization. |

| <b>Field or Control</b>   | <b>Description</b>  |
|---|---|
| <b>ID or Org ID</b>   | 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.  |
| <b>Constituent</b>  | 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.  |
| <b>Search</b>   | Click to access the Search Criteria page where you can search for a donor.<br><br>See <a href="#">Searching for Records</a> .   |
|  | Click to paste a carried ID found using Search/Match functionality.   |
| <b>Recognition</b>  | Select a type of credit the donor is receiving, such as <i>Hard</i> , <i>Soft</i> , <i>Vehicle</i> , and so on. Recognition types are defined by your institution, but always contain at least one hard credit type.  |
| <b>Anonymous</b>  | 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. |
| <b>Description</b>  | Enter any descriptive text to track about the gift or pledge.   |
| <b>Maintain Sessions</b>  | Click to access the Maintain Sessions page where you can check expected and actual amount and balance the session.  |
| <b>Session Defaults</b>   | Click to view or update the defaults you set for this session using the Session Defaults page.  |
| <b>Session Details</b>  | 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

| <i>Page Name</i>  | <i>Definition Name</i>                         | <i>Navigation</i>  | <i>Usage</i>  |
|-------------------|--|--|---|
| Maintain Sessions | AV_BTCH_TOT<br>AV_BTCH_PL_TOT<br>AV_BTCH_M_TOT | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Session Management &gt; Enter Gifts &gt; Maintain Gift Sessions &gt; Maintain Sessions</b></li> <li>• <b>Contributor Relations &gt; Session Management &gt; Enter Pledges &gt; Maintain Pledge Sessions &gt; Maintain Sessions</b></li> <li>• <b>Contributor Relations &gt; Session Management &gt; Enter Memberships &gt; Maintain Membership Sessions &gt; Maintain Sessions</b></li> </ul> | Open a new gift, pledge, or membership session, setting expected transaction counts and amounts. Balance your expected and actual gift, pledge, and membership transaction totals in an open session. |
| Session Defaults  | AV_BTCH_DEF                                    | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Session Management &gt; Enter Gifts &gt; Maintain Gift Sessions &gt; Session Defaults</b></li> <li>• <b>Contributor Relations &gt; Session Management &gt; Enter Pledges &gt; Maintain Pledge Sessions &gt; Session Defaults</b></li> </ul>   | Select a default designation business unit, designation, initiative code, appeal code, and tender type for transactions in the session.   |
| Session Detail    | AV_BTCH_LIST                                   | <b>Contributor Relations &gt; Session Management &gt; Enter Gifts &gt; Maintain Gift Sessions &gt; Session Detail</b>  | 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                              | <b>Contributor Relations &gt; Session Management &gt; Enter Gifts &gt; Maintain Gift Sessions &gt; Session View</b>  | 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**).

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.

Maintain Sessions
Session Defaults
Session Detail
Session View

### Maintain Sessions

**Business Unit:** MEDBU      **Session Number:** NEW      **Institution:** PSUNV  
**Status:** Open      **Last Modification Date:**      **User ID:** PS  
**Date Opened:**      **Balance Date:**      **Post Date:**

**Currency Code:** USD  US Dollar      **Self Service Session**

**Deposit Number:**

| Batch Totals             |                                 |                                       |              |               |                  |                   | Find   View All |
|--------------------------|---------------------------------|---------------------------------------|--------------|---------------|------------------|-------------------|-----------------|
| Tender Type              | Expected Count                  | Expect Amount                         | Actual Count | Actual Amount | Difference Count | Difference Amount |                 |
| CHK <input type="text"/> | <input type="text"/>            | <input type="text" value="500.00"/>   | 0            | 0.00          | 0                | 500.00            | + -             |
| CC <input type="text"/>  | <input type="text" value="10"/> | <input type="text" value="1,000.00"/> | 0            | 0.00          | 10               | 1,000.00          | + -             |
| <b>Total</b>             |                                 |                                       |              |               |                  |                   |                 |
|                          | 10                              | 1,500.00                              | 0            | 0.00          | 10               | 1,500.00          |                 |

[Session Entry](#)
Session Matching Gifts

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

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Currency Code</b>    | <p>Enter a currency code for the session. It defaults to the base currency for your business unit, but can be changed.</p> <hr/> <p><b>Note:</b> You cannot mix currency codes within a session.</p> <hr/> <p>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.</p> <hr/> <p><b>Note:</b> 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.</p> <hr/> |

| <b>Field or Control</b>                | <b>Description</b>  |
|--|---|
| <b>Deposit Number</b>                  | 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.  |
| <b>Tender Type</b>                     | <p>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.</p> <hr/> <p><b>Note:</b> You can mix multiple tender types within a session.</p> <hr/> <p>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.</p> <p>If you are establishing a pledge or pledge adjustment session, the tender type of <i>Pledge</i> automatically populates this field.</p> <p>If you are establishing a membership or membership adjustment session, the tender type of <i>Complimentary</i> 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.</p> |
| <b>Expected Count</b>                  | 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.  |
| <b>Expect Amount</b> (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.  |
| <b>Session Entry</b>                   | Click to begin entering transactions. An intermediate page appears before the transaction entry page; click the <b>Add</b> 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.

| <b>Field or Control</b>       | <b>Description</b>  |
|-------------------------------|---|
| <b>Self-Service Session</b>   | If this check box is selected, indicates that this open session contains gifts created through self-service online giving.  |
| <b>Balance</b>                | 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. |
| <b>Session Matching Gifts</b> | Click to run a COBOL process that analyzes all of the gifts made and generates any expected matching gifts.   |

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**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.

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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.

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.

| Maintain Sessions  | Session Defaults | Session Detail                 | Session View                                   |
|--|------------------|--------------------------------|--|
| <b>Business Unit:</b>  | MEDBU            | <b>Session Number:</b>         | NEW  |
| <b>Status:</b>   | Open             | <b>Last Modification Date:</b> |  |
| <b>Date Opened:</b>  |                  | <b>Balance Date:</b>           |  |
|  |                  | <b>Institution:</b>            | PSUNV  |
|  |                  | <b>User ID:</b>                | PS   |
|  |                  | <b>Post Date:</b>              |  |
| <b>Session Default</b>   |                  |                                |  |
| <b>Business Unit:</b>  | MEDBU            | Medical Business Unit          | <b>Carry Transaction:</b> <input type="text"/> |
| <b>Designation:</b>  | MEDICALBLDG      | Medical School Building Fund   |  |
| <b>Initiative Code:</b>  | MED BLDG         | Medical Building Campaign      |  |
| <b>Appeal Code:</b>  | ANNUAL           | Annual Fund                    |  |
| <b>Tender Type:</b>  | CHK              | Check                          |  |
| <input type="button" value="Balance"/> <a href="#">Session Entry</a> |                  |                                |  |

| <b>Field or Control</b>  | <b>Description</b>  |
|--------------------------|---|
| <b>Business Unit</b>     | Enter the default value to populate the Business Unit field when assigning designations for transactions in this session.   |
| <b>Designation</b>       | Enter the default value to populate the Designation field when assigning designations for transactions in this session.   |
| <b>Initiative Code</b>   | Enter the default value to populate the Campaign field when assigning designations for transactions in this session.  |
| <b>Appeal Code</b>       | Enter the default value to populate the Appeal field when assigning designations for transactions in this session.  |
| <b>Tender Type</b>       | <p>Enter the default value to populate the Tender Type field when entering information on the Gift Entry page for transactions in this session.</p> <p>If you are creating a pledge session, the Tender Type field does not appear.</p>   |
| <b>Carry Transaction</b> | <p>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.</p> <p>This feature is useful when entering a number of donations with the same amounts, designations, and so forth such as alumni membership dues.</p> |

**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" (Campus Solutions 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.

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.

| <b>Field or Control</b>             | <b>Description</b>   |
|-------------------------------------|--|
| <b>Select</b>                       | Select the check box next to each transaction to mark it for deletion from the session.  |
| <b>Gift Number or Pledge Number</b> | This field displays the number (depending on the type of session you are working with) associated with the transaction.<br><br>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 <i>Open</i> .<br><br>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. |

| <b>Field or Control</b>             | <b>Description</b>   |
|-------------------------------------|--|
| <b>Gift Date or Pledge Date</b>     | Displays the date on which the gift or pledge was made to your institution.  |
| <b>Tender</b>                       | Displays the tender in which the gift was made. Tender types are defined by your institution on the Tender Types page.   |
| <b>Gift Amount or Pledge Amount</b> | Displays the monetary amount of the gift or pledge.  |
| <b>Delete</b>                       | <p>Click to remove the selected transactions from the session. All information related to the transaction is deleted from the session.</p> <p>Deleting within an adjustment session removes the adjustment transaction, but the original gift or pledge transaction remains.</p> |
| <b>Add Gift or Add Pledge</b>       | 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.

| <b>Field or Control</b>             | <b>Description</b>   |
|-------------------------------------|--|
| <b>Gift Number or Pledge Number</b> | 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. |
| <b>Add Adjustment</b>               | 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.

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.

|   |            |                                |                                   |
|---|------------|--------------------------------|-----------------------------------|
| <span>Maintain Sessions</span> <span>Session Defaults</span> <span>Session Detail</span> <span><b>Session View</b></span> |            |                                |                                   |
| <b>Business Unit:</b>   | GLAKE      | <b>Session Number:</b>         | 178                               |
| <b>Status:</b>  | Open       | <b>Last Modification Date:</b> | 06/05/2006                        |
| <b>Date Opened:</b>   | 06/05/2006 | <b>Balance Date:</b>           |                                   |
| <b>Institution:</b>   | GLAKE      | <b>User ID:</b>                | PS                                |
| <b>Post Date:</b>   |            |                                |                                   |
| <b>Total Count:</b>   |            | 2                              | <b>Total Amount:</b> 1,000.00 USD |

|   |  |
|---|--|
| <h3>Session View</h3> <p> <a href="#">334 - 500.00</a><br/>                 [AV4012 - Andrea Addamson]<br/> <b>Designation</b><br/>                 [Byerton Alumni Assn Scholarship - 500.00]<br/> <b>Recognition</b><br/>                 [Andrea Addamson - 500.00 Hard]             </p> <p> <a href="#">335 - 500.00</a><br/>                 [AV4013 - Cooper Fratt]<br/> <b>Designation</b><br/>                 [Byerton Alumni Assn Scholarship - 500.00]<br/> <b>Recognition</b><br/>                 [Cooper Fratt - 500.00 Hard]             </p> | <b>Session View Option:</b> <input type="text" value="05 - Expand All"/> |
|---|--|

| Field or Control    | Description   |
|---------------------|---|
| Session View Option | You can sort the tree view by: <i>Designation</i> , <i>Recognition</i> , <i>Tribute</i> , <i>Person Matching Gift</i> , or <i>Org Matching Gift</i> .<br><br>You can also <i>Expand All</i> or <i>Collapse All</i> 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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|------------------|------------------------|---|---|
| Gift Entry       | AV_GIFT_ENTRY          | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Session Management &gt; Enter Gifts &gt; Gift Entry</b></li> <li>• Click the <b>Session Entry</b> link on the Manage Sessions page.</li> </ul> | Enter gift or pledge payment transactions within a session. |

| <b>Page Name</b>   | <b>Definition Name</b> | <b>Navigation</b>  | <b>Usage</b>  |
|--|------------------------|--|---|
| Tender Type Detail   | AV_TENDER_DTL_SP       | Click the <b>Tender Detail</b> 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.   |
| Tender Type Detail - Credit Card                                   | AV_CC_PAYMENT_SP       | Click the <b>Tender Detail</b> button on the Gift Entry, Membership Entry, Gift Adjustment, or Membership Adjustment page when the <b>Tender Type</b> is <i>CC</i> .   | Enter detailed credit card information for gift or membership payments.   |
| What is a security code?   | SSF_SS_PMT_CVV         | Click the <b>What is a security code?</b> link on the Tender Type Detail - Credit Card page.   | Learn more about security codes in credit card transactions.  |
| Tribute  | AV_TRIBUTE_SP          | Click the <b>Notify</b> 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 <b>Matching Gifts</b> 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 <b>Matching Gifts</b> 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 <b>Matching Gifts</b> 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 <b>Pledge Schedule</b> 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              | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Constituent Information &gt; People &gt; Add/Update a Person</b></li> <li>• Click the <b>Update Record</b> button on the Gift Entry or Gift Adjustment page.</li> </ul> | 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. |

| Page Name                              | Definition Name | Navigation   | Usage  |
|--|-----------------|--|--|
| Update Information (for organizations) | AV_UPDATE_ORG   | <ul style="list-style-type: none"> <li>Contributor Relations &gt; Constituent Information &gt; Organizations &gt; Update Organization</li> <li>Click the Update Record button on the Membership Entry or Membership Adjustment page</li> </ul> | 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**).

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.

**Session Number:** 125    **Gift Number:** 280    **Session Count:** 1 of 1    **Session Amount:** 500.00 of 500.00
 
[Maintain Sessions](#)   [Session Defaults](#)   [Session Details](#)

---

**Gift Detail**  Feed Gift   [Search](#)

**ID Type:** Org   **\*Org ID:** AV2000   Lambert Manufacturing

**\*Gift Amount:** 500.00 CAD   **\*Tender:** CHK   **\*Gift Type:** GIFT   **\*Gift Date:** 10/22/2001

**Base Amount:** 344.35 USD   [Open Pledges](#)   [Pledge Schedule](#)

---

**Designations** [Find](#) | [View All](#)   First 1 of 1 Last

| *Business Unit | *Designation | *Campaign | *Appeal Code | *Amount | Charitable Amount |
|----------------|--------------|-----------|--------------|---------|-------------------|
| MEDBU          | MEDICALBLDG  | MED BLDG  | ANNUAL       | 500.00  | 500.00            |

---

**Recognition** [Find](#) | [View All](#)   First 1 of 1 Last

| *ID Type | ID     | Constituent           | *Recognition | Amount | Anonymous                |
|----------|--------|-----------------------|--------------|--------|--------------------------|
| Org      | AV2000 | Lambert Manufacturing | Hard         | 500.00 | <input type="checkbox"/> |

---

**Tribute** [Find](#) | [View All](#)   First 1 of 1 Last

| Tribute Type | ID | Name | Amount   | Occasion               |
|--------------|----|------|----------|------------------------|
| In Memory    |    |      | 0.00 USD | <a href="#">Notify</a> |

**Description:**

---

[Customize](#) | [Find](#) | [View All](#)   First 1 of 1 Last

| Attached File | View | Add Attachment |
|---------------|------|----------------|
|               | View | Add Attachment |

[Maintain Sessions](#)   [Session Defaults](#)   [Session Details](#)

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

| <b>Field or Control</b>   | <b>Description</b>  |
|---|---|
| <b>Feed Gift</b>  | 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.   |
|    | <p>Click to access the Update Record page to either update an existing donor's record or add a new donor to the system.</p> <p>Since the <b>ID Type</b> field on the Gift Entry page populates by default to <i>Person</i>, 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 <i>Org</i> from the ID Type field, enter the organization's ID, then click the Update Record button.</p> <p>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 <i>NEW</i>. If you leave the prompt set to <i>New</i>, the system assumes you are adding a new donor and the pages for adding or updating a new donor appear.</p> |
|  | <p>Click to view the donor's history of commitments on the Transaction Register page.</p> <p>After entering an ID, the Transaction Register page appears and displays information pertaining to the donor you selected.</p>   |

## Gift Detail

| <b>Field or Control</b>      | <b>Description</b>   |
|------------------------------|--|
| <b>ID Type</b>               | Determine whether the donor is a person or an organization.  |
| <b>ID or External Org ID</b> | 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. |
| <b>Search</b>                | <p>Click to access the Search/Match page where you can search for a donor.</p> <p>See "Using Search/Match" (Campus Community Fundamentals).</p>  |

| <b>Field or Control</b>   | <b>Description</b>   |
|---|--|
|  | <p>Click to paste a carried ID found using Search/Match functionality.</p>   |
| <b>Gift Amount</b>  | <p>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.</p>   |
|  | <p>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.</p>  |
| <b>Tender</b>   | <p>Enter the monetary form in which the gift is received. Examples are <i>Cash</i>, <i>CC</i> (credit card), <i>CHK</i> (check), and so on.</p> <p>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.</p> <p>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.</p> <p>If you enter a tender type that has the <i>Allow Zero Amount Special Field</i> selected during setup, you can enter a <b>Gift Amount</b> of zero. Otherwise, the gift amount must be greater than zero.</p> |

| <b>Field or Control</b>   | <b>Description</b>   |
|---|--|
|  | <p>Depending on the tender type you select, click this button to enter its appropriate details on the Tender Type Detail page:</p> <p>For <i>Check</i>, enter the <b>Check Number</b> on the page that appears.</p> <p>For <i>Credit Card</i>, enter the constituent's credit card information on the page that appears.</p> <p>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.</p> <p>For <i>GIK</i>, enter the constituent's gift-in-kind details on the page that appears.</p> <p>For <i>Security</i>, enter the description and details of the constituent's securities on the page that appears.</p> <p>See <a href="#">Entering Tender Type Details</a>.</p> |
| <b>Gift Type</b>  | <p>Select the appropriate gift type from the valid gift types at your institution. Delivered gift types are <i>Gift</i>, <i>PP</i> (pledge payment), <i>GIK</i> (gift-in-kind), and <i>MG</i> (matching gift). Your institution can define additional gift types.</p> <p>If you select <i>PP</i>, the Pledge field becomes active, so you can enter the number of the pledge associated with this payment.</p> <p>Matching Gift is only a valid gift type when the donor is an organization.</p>   |
| <b>Pledge</b>   | <p>If this transaction is a pledge payment, select the associated pledge from the prompt box.</p>  |
| <b>Gift Date</b>  | <p>Enter the date on which the donation is given. This field populates by default to today's date.</p>   |

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Base Amount</b>      | <p>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.</p> <hr/> <p><b>Note:</b> 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.</p> <hr/>  |
| <b>Matching Gifts</b>   | <p><i>If the donor is a person:</i></p> <p>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.</p> <p><i>If the donor is an organization:</i></p> <p>The Matching Gifts button does not appear unless the Gift Type is <i>MG</i>. 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.</p> <hr/> <p><b>Important!</b> You must assign designations and hard credit recognition prior to running the Matching Gifts process.</p> <hr/> <p>See <a href="#">Viewing Matching Gifts for Organizations</a>.</p> |
| <b>Open Pledges</b>     | <p>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.</p>  |
| <b>Pledge Schedule</b>  | <p>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.</p>  |

## 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.

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Business Unit</b>    | <p>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.</p> <p>If you have already selected a designation and appeal, then change the business unit, your selections are backed out.</p> |
| <b>Designation</b>      | <p>Enter the designation to assign. Designations are funds at your institution to which donations and pledges can be allocated.</p> <p>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.</p>   |
| <b>Campaign</b>         | <p>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.</p>   |
| <b>Appeal Code</b>      | <p>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.</p> <p>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.</p>   |
| <b>Amount</b>           | <p>Enter an amount of the donation to allocate to this designation.</p> <p>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.</p>  |

| <b>Field or Control</b>  | <b>Description</b>   |
|--------------------------|--|
| <b>Charitable Amount</b> | 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.

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Amount</b>           | <p>Enter an amount of the donation that gives this donor recognition.</p> <p>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.</p> |

**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.

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Tribute Type</b>     | Select <i>In Memory</i> or <i>In Honor</i> to indicate whether the tribute is in memory of a deceased individual or in honor of an individual.   |
| <b>Name</b>             | 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.        |
| <b>Notify</b>           | Click to access the Tribute page, where you can attach staff IDs to the tribute.<br><br>See <a href="#">Entering Tribute Details</a> .<br><hr/> <b>Note:</b> No workflow is delivered with the Tribute page. <hr/> |

**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:

| <i>Message Number</i> | <i>Message Text</i>   | <i>Explanation</i>  | <i>Condition to Appear</i>                                  |
|-----------------------|---|---|---|
| 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.<br>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.<br>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:

| <i>Message Number</i> | <i>Message Text</i>                   | <i>Explanation</i>   | <i>Condition to Appear</i>  |
|-----------------------|---------------------------------------|--|---|
| 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.

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Check Number</b>     | If you selected <i>Check</i> 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.

| <b>Field or Control</b>         | <b>Description</b>   |
|---------------------------------|--|
| <b>First Name</b>               | 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.  |
| <b>Last Name</b>                | 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.   |
| <b>Organization Name</b>        | If entering a payment for an organization, enter the organization name.  |
| <b>Credit Card Type</b>         | Select the type of credit card the credit card holder is using. These values are set up on the Credit Card Type page.<br><br>See <a href="#">Defining Credit Card Types</a> .  |
| <b>Credit Card Number</b>       | Enter the credit card holder's card number. The length of the credit card number is established on the Credit Card Type page.  |
| <b>Expiration Date</b>          | Enter the expiration month and year as it appears on the credit card.  |
| <b>Security Code</b>            | Enter the security code as it appears on the credit card.  |
| <b>What is a security code?</b> | 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.  |
| <b>Email Address</b>            | 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.<br><br>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:

| <b>Field or Control</b>  | <b>Description</b>  |
|--------------------------|---|
| <b>Gift Description</b>  | 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.  |
| <b>Gift Purpose</b>      | Enter the reason for the gift and how it will be used.  |
| <b>Estimated Value</b>   | 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 accurately declare the gift's value. |
| <b>Written Appraisal</b> | Select this check box when a written appraisal is received with the gift-in-kind.   |
| <b>Appraised Value</b>   | Enter the valued amount of the gift-in-kind, as determined by an external appraiser.  |
| <b>Appraisal Date</b>    | Enter the date that the appraisal was made.   |

For securities tender type details, on the Security Information 1 tab:

| <b>Field or Control</b>               | <b>Description</b>  |
|---------------------------------------|---|
| <b>Gift Description</b>               | Enter a brief description of the security to be incorporated into the AVAK LetterGen.SQC for it to be used in an acknowledgement. |
| <b>Stock/Security Name and Symbol</b> | Enter the name and trading symbol for the company whose stock has been given.   |
| <b>Number of Shares</b>               | Enter the number of shares of the stock or security being transferred to the institution as a gift.                               |

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Estimated Value</b>  | 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:

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Day Low/Ask</b>      | 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.  |
| <b>Day High/Bid</b>     | 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. |
| <b>Public</b>           | 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.

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**Note:** No workflow is delivered with this page.

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| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>In Memory of</b>     | The system selects this option if you selected <i>In Memory</i> in the Tribute Type field on the Gift Entry page.   |
| <b>In Honor of</b>      | The system selects this option if you selected <i>In Honor of</i> in the Tribute Type field on the Gift Entry page. |
| <b>Occasion</b>         | This field populates by default with the Occasion field value on the Gift Entry page.                               |

| <i><b>Field or Control</b></i> | <i><b>Description</b></i>  |
|--------------------------------|--|
| <b>Amount</b>                  | 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.

| <i><b>Field or Control</b></i> | <i><b>Description</b></i>   |
|--------------------------------|---|
| <b>External Org ID</b>         | Identify the organization from which you anticipate a matching gift payment.  |
| <b>Expected Match Amount</b>   | Enter the amount you expect to receive as a match.  |
| <b>Processed Date</b>          | 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. |
| <b>Description</b>             | 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).

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.

**External Org Matching Gifts**

Org ID: AV2000 Lambert Manufacturing

Matching Gift Amount: 344.35 USD

Actual Match Total: 0.00      Difference: 344.35

| Outstanding Gifts To Be Matched |        |                  |           |                       |                     |            |              |            |                          |
|---------------------------------|--------|------------------|-----------|-----------------------|---------------------|------------|--------------|------------|--------------------------|
| ID                              | Name   | Gift Number      | Gift Date | Expected Match Amount | Actual Match Amount | Match Date | Process Date | Denied     |                          |
| <input type="checkbox"/>        | AV0001 | Gallegher, Shawn | 322       | 09/10/2006            | 490.00 USD          | 450.00     | 12/17/2009   | 12/17/2009 | <input type="checkbox"/> |

| New Gifts Being Matched |               |             |           |                     |            |              |  |
|-------------------------|---------------|-------------|-----------|---------------------|------------|--------------|--|
| ID                      | Name          | Gift Number | Gift Date | Actual Match Amount | Match Date | Process Date |  |
| AV0003                  | Judity Talley | 178         |           | 400.00 USD          | 12/25/2009 | 12/25/2009   |  |

[Organization Relationship](#)

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

| <i>Field or Control</i>    | <i>Description</i>   |
|----------------------------|--|
| <b>ID</b>                  | Select the check box for the gift that is being matched by the organization's matching gift payment.   |
| <b>Actual Match Amount</b> | 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. |
| <b>Match Date</b>          | 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.

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>ID</b>               | 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).

| <i>Field or Control</i>  | <i>Description</i>   |
|--------------------------|--|
| <b>Select</b>            | Select the check box if you have received the gift. The Expected Date and Expected Amount fields become unavailable for input.                             |
| <b>Expected Date</b>     | Enter the date on which you expect to receive the pledge payment.  |
| <b>Expected Amount</b>   | Enter the pledge payment amount you expect to receive.   |
| <b>Received Date</b>     | Enter the date on which a pledge payment is received.  |
| <b>Received Amount</b>   | Enter the monetary amount of a pledge payment.   |
| <b>Notification Sent</b> | Select to indicate that a notification of the scheduled pledge payment has been sent.<br><hr/> <b>Note:</b> No workflow is delivered with this page. <hr/> |

## 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

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Biodemo/Address</b>  | Click to access the Bio/Demo data component to update a person's name, address, biographic, and ethnicity information.   |
| <b>Names</b>            | Click to access the Names page where you can update information about the various names for a constituent.   |
| <b>Class Year</b>       | 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. |
| <b>Work Experience</b>  | Click to access the Work Experience page where you can update information about a constituent's employment history.  |

## Relationship Data

| <i>Field or Control</i>          | <i>Description</i>   |
|----------------------------------|--|
| <b>Person Relationship</b>       | Click to access the Relationships component where you can update information about a constituent's relationships with other people in the system.        |
| <b>Organization Relationship</b> | 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

| <i>Field or Control</i>  | <i>Description</i>  |
|--------------------------|---|
| <b>Constituent Types</b> | 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. |
| <b>Involvement</b>       | 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

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Add Person</b>       | 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 <i>NEW</i> to assign the next available sequential ID number to the person.                           |
| <b>Add Organization</b> | 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 <i>NEW</i> 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

| <i>Field or Control</i>          | <i>Description</i>   |
|----------------------------------|--|
| <b>Organization Data/Address</b> | Click to access the component where you can update an organization's description, organization type, and primary location information.                   |
| <b>Organization Locations</b>    | Click to access the component where you can update information about an organization's other locations, phone numbers, and email addresses.              |
| <b>Organization Departments</b>  | Click to access the component where you can update an organization's departments, department locations, and department email addresses.                  |
| <b>Organization Contacts</b>     | 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

| <b><i>Field or Control</i></b>   | <b><i>Description</i></b>   |
|----------------------------------|---|
| <b>Person Relationship</b>       | Click to access the Org/Person Relationships page where you can update information about a constituent's relationships with people in the system.   |
| <b>Organization Relationship</b> | Click to access the Relationships page where you can update information about a constituent's relationships with other organizations in the system. |

## Constituent Data

| <b><i>Field or Control</i></b> | <b><i>Description</i></b>  |
|--------------------------------|--|
| <b>Constituent Types</b>       | 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. |
| <b>Involvement</b>             | 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

| <b><i>Field or Control</i></b> | <b><i>Description</i></b>   |
|--------------------------------|---|
| <b>Add Person</b>              | 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 <i>NEW</i> to assign the next available sequential ID number to the person.                           |
| <b>Add Organization</b>        | 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 <i>NEW</i> 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

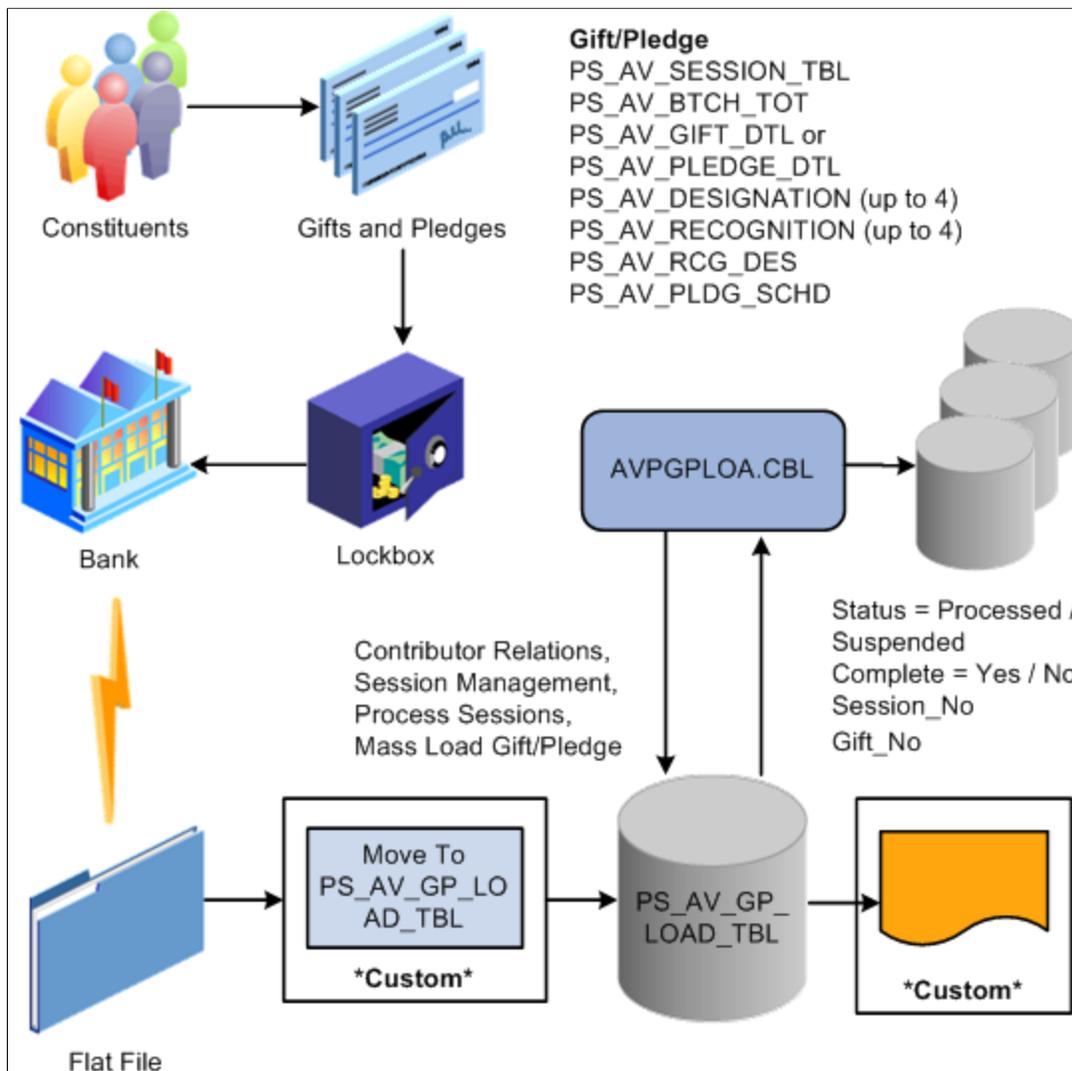
| <i>Page Name</i>      | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|-----------------------|------------------------|---|--|
| Mass Load Gift/Pledge | AV_RUN_CNTL            | <b>Contributor Relations</b> ><br><b>Session Management</b> ><br><b>Process Sessions</b> > <b>Mass Load Gift/Pledge</b> | 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:

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**).

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Business Unit</b>    | Enter the business unit for which you want to run the process.  |
| <b>Institution</b>      | When you enter a business unit, the system automatically populates the institution to which the transactions are processed. |

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Address Type</b>     | Select which address to use when loading the transaction.<br><br>For credit card transactions, CyberSource requires an address to be attached to the credit card information before it can process the transaction. During the AVPGLOA 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. |
| <b>Commit Level</b>     | 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 AVPGLOA 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 AVPGLOA 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

| <i>Page Name</i>   | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|--|------------------------|---|---|
| Gift Summary, Supervisor Gift Summ (supervisor gift summary) | AV_GIFT_SMRY           | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Session Management &gt; Supervise Sessions &gt; Gift Sessions &gt; Gift Summary</b></li> <li>• <b>Contributor Relations &gt; Session Management &gt; Supervise Sessions &gt; Gift Sessions &gt; Supervisor Gift Summary</b></li> </ul> | 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. |

| <b>Page Name</b>     | <b>Definition Name</b> | <b>Navigation</b>  | <b>Usage</b>  |
|----------------------|------------------------|--|---|
| Gift Detail          | AV_GIFT_DTL_SP         | <ul style="list-style-type: none"> <li>You can access the Gift Detail page through multiple navigation paths. The list below contains the most frequently used paths.</li> <li>Click the <b>Details</b> link on the Gift Summary page.</li> <li>Click the <b>Details</b> link on the Supervisor Gift Summ page.</li> </ul> | View detailed information about a particular gift or pledge payment transaction.  |
| Designation Detail   | AV_DSG_DTL_SP          | <ul style="list-style-type: none"> <li>You can access the Designation Detail page through multiple navigation paths. Below is a frequently used path.</li> <li>Click the <b>Designation</b> button on the Gift Detail page.</li> </ul>   | View detailed information about the designations assigned to a particular transaction.  |
| Recognition Detail   | AV_RECG_DTL_SP         | <ul style="list-style-type: none"> <li>You can access the Recognition Detail page through multiple navigation paths. The most frequently used path follows:</li> <li>Click the <b>Recognition</b> button on the Gift Detail page</li> </ul>  | View detailed information about the recognition given for a particular transaction.   |
| Matching Gift Detail | AV_MTCH_GIFT_SP        | <ul style="list-style-type: none"> <li>Click the <b>Matching Gifts</b> button on the Gift Detail page.</li> <li>Click the <b>Details</b> button on the Matching Gifts Summary or Matching Gifts Summary - Org page.</li> </ul>   | View detailed information about the potential matching gifts for a transaction.   |
| Tribute              | AV_TRIB_INQ_SP         | Click the <b>Tribute</b> button on the Gift Detail, Pledge Detail, Adjust Gift Detail, or Adjust Pledge Detail pages.  | <p>View all tribute details related to a particular gift or pledge. This information is entered on the Tribute page during gift or pledge entry.</p> <hr/> <p><b>Note:</b> No workflow is delivered with this page.</p> <hr/> |

## 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.

| <i>Field or Control</i>     | <i>Description</i>  |
|-----------------------------|---|
| <b>Details</b>              | Click to view detailed information about a particular gift or pledge payment on the Gift Detail page.   |
| <b>Add Gift</b>             | If the gift session you selected is open, click to add an additional gift to the session.   |
| <b>Select and Edit Gift</b> | 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 Session](#) [Queuing Sessions for Posting](#) [Processing and Posting Sessions](#).

## Page Used to Adjust Gifts and Matching Gifts

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>  |
|------------------|------------------------|--|---|
| Gift Adjust      | AV_ADJ_GIFT            | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Session Management &gt; Enter Gifts &gt; Gift Adjustment</b></li> <li>• Click a <b>Gift Nbr</b> link on the Session Detail page.</li> </ul> | Adjust an existing gift transaction you selected on the Session Detail page.  |
| Matching Gifts   | AV_MTCH_P_GIFT_SP      | Click the <b>Matching Gifts</b> 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.

---

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.

### Gift Adjust

**Session Number:** 187     **Gift Number:** 361     **Session Count:** 1 of 1     **Session Amount:** 260.00 of 260.00  
[Maintain Sessions](#) [Session Defaults](#) [Session Details](#)

---

**Gift Detail**

**Feed Gift**     **Refund**  
**ID:** AV0001    Gallagher, Shawn    Alumni    2001

**'Reason:**

**'Gift Amount:**  USD    **'Tender:**     **'Gift Type:**     **'Gift Date:**

[Matching Gifts](#)    [Open Pledges](#)    [Pledge Schedule](#)

---

**Designations**    [Find](#) | [View All](#)    First 1 of 1 Last

| 'Business Unit | 'Designation | 'Campaign | 'Appeal Code | 'Amount | Charitable Amount  |
|----------------|--------------|-----------|--------------|---------|--|
| MEDBU          | MEDICALBLDG  | MED BLDG  | ANNUAL       | 260.00  | 260.00 <input type="button" value="+"/> <input type="button" value="-"/> |

---

**Recognition**    [Find](#) | [View All](#)    First 1 of 1 Last

| 'ID Type | 'ID    | Constituent      | 'Recognition | 'Amount | Anonymous  |
|----------|--------|------------------|--------------|---------|--|
| Person   | AV0001 | Gallagher, Shawn | Alumni       | Hard    | 260.00 <input type="button" value="+"/> <input type="button" value="-"/> |

---

**Tribute**    [Find](#) | [View All](#)    First 1 of 1 Last

| Tribute Type | ID | Name | Amount   | Occasion  |
|--------------|----|------|----------|---|
| In Memory    |    |      | 0.00 USD | <input type="button" value="Notify"/> <input type="button" value="+"/> <input type="button" value="-"/> |

**Description:**

---

[Customize](#) | [Find](#) | [View All](#)    First 1 of 1 Last

| Attached File | View                                | Add Attachment   |
|---------------|-------------------------------------|--|
|               | <input type="button" value="View"/> | <input type="button" value="Add Attachment"/> <input type="button" value="Add Attachmer"/> |

[Maintain Sessions](#) [Session Defaults](#) [Session Details](#)

**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<br>Base Amt |
| Any Other Currency        | Display in Other Currency button<br>Base Amt | None   |

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Reason</b>           | You must select a reason for the adjustment. Reasons are defined by your institution, and describe the reason why an adjustment is made.  |
| <b>Refund</b>           | Select if the gift adjustment results in a refund to the donor.<br><br>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 the **External 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.

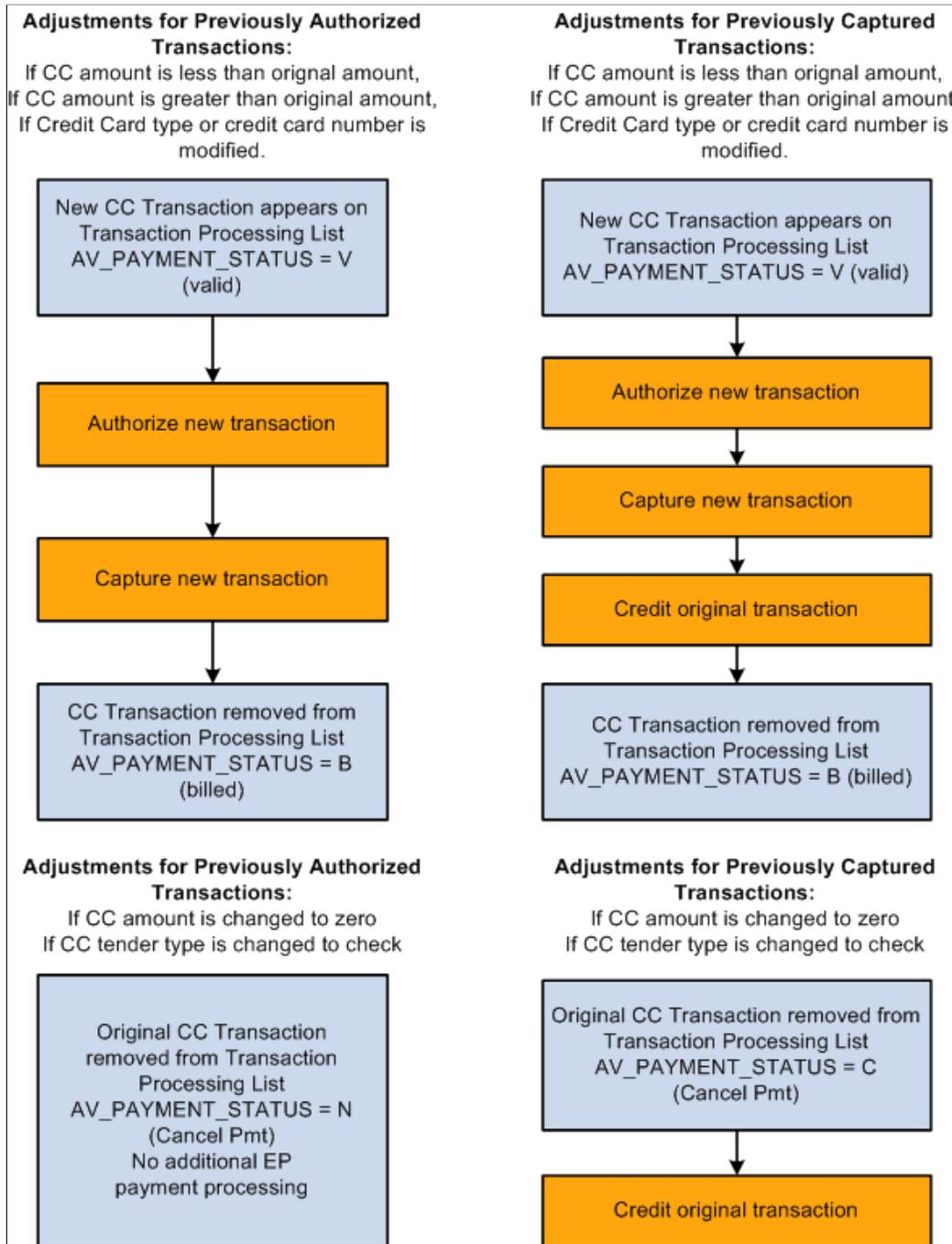
To reauthorize and credit adjusted transactions:

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:

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

| <i>Page Name</i>                                | <i>Definition Name</i>                        | <i>Navigation</i>  | <i>Usage</i>  |
|---|---|--|---|
| Cond Pledge Entry<br>(conditional pledge entry) | AV_CP_ENTRY<br>AV_CP_ENTRY_E<br>AV_CP_ENTRY_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Session Management &gt; Enter Pledges &gt; Conditional Pledges &gt; Conditional Pledges &gt; Cond Pledge Entry</b></li> <li>• <b>Contributor Relations &gt; Session Management &gt; Enter Pledges &gt; Conditional Pledges - Org &gt; Cond Pledge Entry</b></li> <li>• <b>Contributor Relations &gt; Session Management &gt; Enter Pledges &gt; Conditional Pledges - Workset &gt; Cond Pledge Entry</b></li> </ul> | Enter basic information about a conditional pledge. |

| <b>Page Name</b>  | <b>Definition Name</b>                           | <b>Navigation</b>   | <b>Usage</b>  |
|---|--|---|---|
| Cond Pledge Designations<br>(conditional pledge designations) | AV_CP_ENTRY2<br>AV_CP_ENTRY2_E<br>AV_CP_ENTRY2_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Session Management &gt; Enter Pledges &gt; Conditional Pledges &gt; Conditional Pledges &gt; Cond Pledge Designations</b></li> <li>• <b>Contributor Relations &gt; Session Management &gt; Enter Pledges &gt; Conditional Pledges &gt; Conditional Pledges - Org &gt; Cond Pledge Designations</b></li> <li>• <b>Contributor Relations &gt; Session Management &gt; Enter Pledges &gt; Conditional Pledges &gt; Conditional Pledges - Workset &gt; Cond Pledge Designations</b></li> </ul> | Apply a conditional pledge to designations, or allocation accounts at your institution. |
| Cond Pledge Recognition<br>(conditional pledge recognition)   | AV_CP_ENTRY3<br>AV_CP_ENTRY3_E<br>AV_CP_ENTRY3_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Session Management &gt; Enter Pledges &gt; Conditional Pledges &gt; Conditional Pledges &gt; Cond Pledge Recognition</b></li> <li>• <b>Contributor Relations &gt; Session Management &gt; Enter Pledges &gt; Conditional Pledges &gt; Conditional Pledges - Org &gt; Cond Pledge Recognition</b></li> <li>• <b>Contributor Relations &gt; Session Management &gt; Enter Pledges &gt; Conditional Pledges &gt; Conditional Pledges - Workset &gt; Cond Pledge Recognition</b></li> </ul>    | 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**).

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.

The screenshot shows the 'Cond Pledge Entry' page with the following details:

- Constituent:** Gallegher, Shawn
- ID:** AV0001
- Constituent Type:** Alumni
- Year:** 2001
- Institution:** PSUNV
- Pledge Nbr:** NEW
- \*Status:** Active
- Pledge Amt:** 200.00 USD
- Effective Date:** 06/30/2004
- \*Payment Schedule:** S-Annual
- \*First Payment Date:** 06/30/2004
- \*Fulfillment Date:** 07/01/2005
- Description:** (Empty text area)

This page holds information about the commitment amount and the initial pledge payment schedule.

| <b>Field or Control</b>           | <b>Description</b>  |
|-----------------------------------|---|
| <b>Pledge Amt</b> (pledge amount) | Enter the total monetary amount of the commitment.  |
| <b>Payment Schedule</b>           | Indicate the increments of time in which pledge payments will be made. Examples are <i>Annual</i> , <i>Monthly</i> , and so on.<br><br>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. |
| <b>First Payment Date</b>         | Enter the date on which you expect the first payment to be made for this conditional pledge.  |
| <b>Fulfillment Date</b>           | 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**).

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.

| <b>Field or Control</b>                   | <b>Description</b>   |
|---|--|
| <b>Des BU</b> (designation business unit) | <p>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.</p> <p>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.</p> <p>If you have already selected a designation and appeal, then change the business unit, your selections are backed out.</p> |
| <b>Designation</b>                        | <p>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.</p> <p>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.</p>                                  |
| <b>Campaign</b>                           | <p>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.</p>   |

| <b>Field or Control</b>         | <b>Description</b>   |
|---------------------------------|--|
| <b>Appeal</b>                   | <p>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.</p> <p>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.</p>   |
| <b>Pct (percent) and Amount</b> | <p>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.</p> <p>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.</p> |

## Assigning Conditional Pledge Recognition

Access the Cond Pledge Recognition page (**Contributor Relations > Session Management > Enter Pledges > Conditional Pledges > Conditional Pledges > Cond Pledge Recognition**).

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.

The screenshot displays the 'Cond Pledge Recognition' page for contributor Gallegher, Shawn (ID: AV0001, Year: 2001, Institution: PSUNV). The page includes a navigation bar with tabs for 'Cond Pledge Entry', 'Cond Pledge Designations', and 'Cond Pledge Recognition'. Below the navigation, there are search and view options (Find | View All | First | 1 of 1 | Last). The main form area contains the following fields and controls:

- Pledge Nbr:** NEW (with a 'Use Default Recognition' button)
- Recognition Hard Credit Total:** A summary row showing **Pct:** 100.0000 and **Amt:** 200.00
- Recognition:** A section with search and view options (Find | View All | First | 1 of 1 | Last) and the following fields:
  - \*ID Type:** Person (dropdown menu)
  - ID:** AV0001 (text input with search icon) and Gallegher, Shawn (text display)
  - \*Recognition Type:** Hard Credit (dropdown menu)
  - Recognition Pct:** 100.0000 (text input)
  - Amount:** 200.00 (text input)

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.

| <b>Field or Control</b>                      | <b>Description</b>  |
|--|---|
| <b>Use Default Recognition</b>               | <p>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.</p> <p>See "Defining Contributor Relations User Defaults" (Campus Solutions Application Fundamentals).</p>  |
| <b>Recognition Type</b>                      | <p>Select the type of credit the donor is receiving, such as <i>Hard Credit</i>, <i>Soft Credit</i>, <i>Vehicle Credit</i>, 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.</p>  |
| <b>Recognition Pct</b> (recognition percent) | <p>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.</p> <p>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.</p> |

---

**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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|------------------|------------------------|---|--|
| Pledge Entry     | AV_PLEDGE_ENTRY        | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Session Management &gt; Enter Pledges &gt; Pledge Entry</b></li> <li>• Click the <b>Session Entry</b> link on the Maintain Pledge Session page.</li> </ul>   | Enter pledge transactions into the system.   |
| Pledge Schedule  | AV_PLDG_SCHD           | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Session Management &gt; Enter Pledges &gt; Pledge Entry &gt; Pledge Schedule</b></li> <li>• <b>Contributor Relations &gt; Session Management &gt; Enter Pledges &gt; Pledge Adjustment &gt; Payment Schedule Adjust</b></li> </ul> | Determine a pledge payment schedule that indicates the date and amount of each pledge payment. |

| Page Name       | Definition Name                        | Navigation   | Usage   |
|-----------------|--|--|---|
| Pledge Schedule | AV_PLDG_SCHD_ADJ<br>AV_PLDG_SCHD_ADJ_E | <ul style="list-style-type: none"> <li>Contributor Relations &gt; Session Management &gt; Enter Pledges &gt; Pledge Schedules &gt; Pledge Schedule</li> <li>Contributor Relations &gt; Session Management &gt; Enter Pledges &gt; Pledge Schedules &gt; Pledge Schedule - Org</li> </ul> | 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**).

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.

**Pledge Entry** | Pledge Schedule

Session Number: 190    Pledge Number: NEW    Session Count: 0 of 1    Session Amount: 0.00 of 500.00

[Maintain Sessions](#)   [Session Defaults](#)   [Session Details](#)

**Pledge Detail**

Feed Pledge   [Search](#)

ID Type: Person   ID: AV0004   Holmgren, June   Alumni   1989

'Pledge Amount: 500.00 USD   'Effective Date: 12/17/2009   'Payment Schedule: S-Annual   'First Payment Date: 12/01/09   'Fulfillment Date: 07/15/10

**Designations**   Find | View All   First 1 of 1 Last

| 'Business Unit | 'Designation | 'Campaign | 'Appeal Code | 'Amount |
|----------------|--------------|-----------|--------------|---------|
| PSUNV          | ANNUALFUND   | ANNFUND   | ANNUAL       | 500.00  |

**Recognition**   Find | View All   First 1 of 1 Last

| ID Type | ID     | Constituent    | 'Recognition | Amount | Anonymous |
|---------|--------|----------------|--------------|--------|-----------|
| Person  | AV0004 | Holmgren, June | Alumni       | Hard   | 500.00    |

**Tribute**   Find | View All   First 1 of 1 Last

| Tribute Type | ID | Name | Amount   | Occasion |
|--------------|----|------|----------|----------|
| In Memory    |    |      | 0.00 USD |          |

Description:

Customize | Find | View All |   First 1 of 1 Last

**Attachments**   Audit

| Attached File | View | Add Attachment |
|---------------|------|----------------|
|               | View | Add Attachment |

[Maintain Sessions](#)   [Session Defaults](#)   [Session Details](#)

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

| <b>Field or Control</b>                  | <b>Description</b>   |
|--|--|
| <b>Pledge Amt</b> (pledge amount)        | Enter the total monetary amount of the commitment.   |
| <b>Pmt Schd</b> (payment schedule)       | <p>Indicate the increments of time in which pledge payments will be made, such as <i>Annual</i>, <i>Monthly</i>, 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.</p> <p>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.</p> |
| <b>First Pmt Dt</b> (first payment date) | Enter the date on which the first pledge payment for this pledge is expected to be made.   |
| <b>Fulfillment Date</b>                  | <p>Enter the date on which the final payment for the pledge will be made.</p> <hr/> <p><b>Note:</b> 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.</p> <hr/>   |
| <b>Feed Pledge</b>                       | 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.

| <b>Field or Control</b>                      | <b>Description</b>  |
|--|---|
| <b>Convert to Pledge</b>                     | <p>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.</p> <hr/> <p><b>Note:</b> You will have the option to deactivate the conditional pledge after you have attached it to an actual pledge in Pledge Entry.</p> <hr/> |
| <b>CP Nbr</b> (conditional pledge number)    | Displays the system generated number associated with the donor's conditional pledge.  |
| <b>CP Amount</b> (conditional pledge amount) | Displays the monetary amount of the donor's conditional pledge, but can be overwritten.   |
| <b>First Payment Date</b>                    | Displays the date on which the donor plans to make the first payment on the pledge, but can be overwritten.   |
| <b>Fulfillment Date</b>                      | 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.

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Business Unit</b>    | <p>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.</p> <p>If you have already selected a designation and appeal, then change the business unit, your selections are backed out.</p> |

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Designation</b>      | <p>Enter the designation to assign. Designations are funds at your institution to which donations and pledges can be allocated.</p> <p>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.</p>         |
| <b>Campaign</b>         | <p>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.</p>                   |
| <b>Appeal Code</b>      | <p>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.</p> <p>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.</p> |
| <b>Amount</b>           | <p>Enter an amount of the pledge to allocate to this designation.</p>   |

---

**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.

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Tribute Type</b>     | Select <i>In Memory</i> or <i>In Honor</i> to indicate whether the tribute is in memory of a deceased individual or in honor of an individual.  |
| <b>ID and Name</b>      | 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. |
| <b>Amount</b>           | The amount of the pledge populates by default, but you can change this.   |
| <b>Occasion</b>         | 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**).

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.

Pledge Entry
**Pledge Schedule**

**Session Number:** 155      **Pledge Number:** NEW

---

**ID:**

**Duration:**      **\*Payment Schedule:** S-Annual

**Fulfillment Date:** Adjust      **First Payment Date:**

Find | View All    First ◀ 1 of 1 ▶ Last

| *Expected Date   | Expected Amount | Received Date | Received Amount | Balance  | Notified                 |
|--|-----------------|---------------|-----------------|----------|--------------------------|
| 06/30/2004 <span style="font-size: x-small;">BT</span> | 500.00          |               | 0.00            | 0.00     | <input type="checkbox"/> |
| 500.00   |                 |               | 0.00            | 0.00 USD |                          |

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.

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Expected Date</b>    | 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. |
|                         | <hr/> <p><b>Important!</b> You can change the expected date for any pledge payments for which Notifications have not been sent or that have not been paid.</p> <hr/>   |
| <b>Expected Amount</b>  | 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.                       |
| <b>Received Date</b>    | Displays the date on which a pledge payment is received.   |

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Received Amount</b>  | Displays the monetary amount of a pledge payment.  |
| <b>Balance</b>          | 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.               |
| <b>Notified</b>         | Select to indicate that a notification of the scheduled pledge payment has been sent.<br><br><b>Note:</b> You cannot change expected pledge payments for which notifications have been sent. |
| <b>Adjust</b>           | 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**).

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.

### Pledge Schedule

Russell Sargent ID: AV0036

Constituent Type: [Friend](#) Year: [None](#) PSUNV Prospect Manager: NONE

Pledge Number: 217 [Details](#) Effective Date: 02/14/2002 Pledge Amount: 100,000.00 USD

Payment Schedule: S-Annual Pledge Balance: 100,000.00

Duration: 6 months 1 day Payments Received: 0.00

[Customize](#) | [Find](#) | [View All](#) | [First](#) | 1-2 of 2 | [Last](#)

|   | Expected Date                | Expected Amount | Received Date | Received Amount | Notification Sent        |  |   |
|---|------------------------------|-----------------|---------------|-----------------|--------------------------|--|---|
| 1 | 02/14/2002 <small>31</small> | 50,000.00       |               |                 | <input type="checkbox"/> |  | <input type="button" value="+"/> <input type="button" value="-"/> |
| 2 | 08/14/2002 <small>31</small> | 50,000.00       |               |                 | <input type="checkbox"/> |  | <input type="button" value="+"/> <input type="button" value="-"/> |

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.

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Details</b>          | 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

| <i>Page Name</i>                            | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|---|------------------------|---|--|
| Pledge Summary<br>Supervisor Pledge Summary | AV_PLDG_SMRY           | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Session Management &gt; Supervise Sessions &gt; Pledge Sessions &gt; Pledge Summary</b></li> <li>• <b>Contributor Relations &gt; Session Management &gt; Supervise Sessions &gt; Pledge Sessions &gt; Supervisor Pledge Summary</b></li> </ul> | 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. |

| <b>Page Name</b>     | <b>Definition Name</b>                           | <b>Navigation</b>   | <b>Usage</b>   |
|----------------------|--|---|--|
| Pledge Detail        | AV_PLDG_DTL_SP                                   | <ul style="list-style-type: none"> <li>You can access the Pledge Detail page through multiple navigation paths. Below is a frequently used path.</li> <li>Click the <b>Details</b> button on the Pledge Summary page.</li> </ul>  | View detailed information about a pledge transaction.                            |
| Open Pledge Register | AV_OPEN_PLDG<br>AV_OPEN_PLDG_E<br>AV_OPEN_PLDG_W | <ul style="list-style-type: none"> <li><b>Contributor Relations &gt; Analyze Giving History &gt; Person Giving Summaries &gt; Open Pledge Register</b></li> <li><b>Contributor Relations &gt; Analyze Giving History &gt; Organization Giving Summaries &gt; Open Pledge Register-Org</b></li> <li><b>Contributor Relations &gt; Session Management &gt; Enter Pledges &gt; Pledge Schedules &gt; Open Pledge Register - Workset</b></li> </ul> | View a summary of a donor's pledges with open balances.                          |
| Pledge Schedule      | AV_PLDG_SCHD_INQ<br>AV_PLDG_SCHD_INQ_E           | <ul style="list-style-type: none"> <li><b>Contributor Relations &gt; Analyze Giving History &gt; Person Giving Summaries &gt; Pledge Schedule</b></li> <li><b>Contributor Relations &gt; Analyze Giving History &gt; Organization Giving Summaries &gt; Pledge Schedule - Org</b></li> </ul>  | 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.

| <i>Field or Control</i>       | <i>Description</i>  |
|-------------------------------|---|
| <b>Details</b>                | Click to view detailed information about a particular pledge on the Pledge Detail page.   |
| <b>Select and Edit Pledge</b> | 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**).

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Business Unit</b>    | 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**).

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Details</b>          | 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 [Queuing Sessions for Posting Processing and Posting Sessions](#).

## Pages Used to Adjust Pledges

| <i>Page Name</i>        | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|-------------------------|------------------------|---|---|
| Pledge Adjust           | AV_ADJ_PLEDGE          | <b>Contributor Relations &gt; Session Management &gt; Enter Pledges &gt; Pledge Adjustment &gt; Pledge Adjust</b>           | Adjust an existing pledge transaction.  |
| Payment Schedule Adjust | AV_PLDG_SCHD           | <b>Contributor Relations &gt; Session Management &gt; Enter Pledges &gt; Pledge Adjustment &gt; Payment Schedule Adjust</b> | Adjust an existing pledge payment schedule as part of a transaction adjustment. |

### Related Links

[Determining a Pledge Payment Schedule Within a Session](#)

## Entering a Pledge Adjustment Transaction

Access the Pledge Adjust page (**Contributor Relations > Session Management > Enter Pledges > Pledge Adjustment > Pledge Adjust**).

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.

The screenshot shows the 'Pledge Adjust' page with the following sections:

- Session Information:** Session Number: 127, Pledge Number: 281, Session Count: 1 of 1, Session Amount: 15,000.00 of 15,000.00.
- Pledge Detail:** ID: 8664, Reason: Data entry error, Pledge Amount: 15,000.00 USD, Effective Date: 10/22/2001, Payment Schedule: Quarterly, First Payment Date: 01/01/2002, Fulfillment Date: 12/31/2002.
- Designations:** Table with columns: Business Unit (MEDBU), Designation (BUSINESS), Campaign (MED BLDG), Appeal Code (ANNUAL), Amount (7,500.00).
- Recognition:** Table with columns: ID Type (Person), ID, Constituent, Recognition (Hard), Amount (0.00), Anonymous.
- Tribute:** Table with columns: Tribute Type (In Memory), ID, Name, Amount (0.00 USD), Occasion.
- Description:** A large text area for entering a description.
- Attachments:** A table with columns: Attached File, View, Add Attachment, Add Attachmer.

**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.

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Reason</b>           | 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

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## 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.

| <i>User</i>           | <i>Access Page</i>                           |
|-----------------------|--|
| Organization Employee | Gift Entry - Tender Detail button            |
|                       | Gift Adjustment - Tender Detail button       |
|                       | Membership Entry - Tender Detail button      |
|                       | Membership Adjustment - Tender Detail button |

| <b>User</b>              | <b>Access Page</b>  |
|--------------------------|---|
| 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

| <b>Field or Control</b>   | <b>Description</b>   |
|---|--|
| <b>ID Type</b>  | Select whether the donor is a person or an organization.   |
| <b>ID or Org ID</b>   | 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.   |
| <b>Constituent</b>  | 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.   |
| <b>Search</b>   | Click to access the Search/Match page where you can search for a donor.<br><br>See <a href="#">Searching for Records</a> .   |
|  | Click to paste a carried ID found using Search/Match functionality.  |
| <b>Recognition</b>  | Select a type of credit the donor is receiving, such as <i>Hard</i> , <i>Soft</i> , <i>Vehicle</i> , and so on. Recognition types are defined by your institution, but always contain at least one hard credit type. |

| <b>Field or Control</b>  | <b>Description</b>   |
|--------------------------|--|
| <b>Amount</b>            | <p>Enter an amount of the donation that gives this donor recognition.</p> <p>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.</p> |
| <b>Anonymous</b>         | 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.  |
| <b>Tribute Type</b>      | Select <i>In Memory</i> or <i>In Honor</i> to indicate whether the tribute is in memory of a deceased individual or in honor of an individual.   |
| <b>Name</b>              | 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.  |
| <b>Amount</b>            | The amount of the gift populates by default in this field, but you can change this amount.   |
| <b>Occasion</b>          | 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.   |
| <b>Maintain Sessions</b> | Click to access the Maintain Sessions page where you can check expected and actual amount and balance the session.   |
| <b>Session Defaults</b>  | Click to view or update the defaults you set for this session using the Session Defaults page.   |
| <b>Session Details</b>   | 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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>  |
|------------------|------------------------|--|---|
| Queue Sessions   | AV_POST_SESSION        | <ul style="list-style-type: none"> <li><b>Contributor Relations &gt; Session Management &gt; Queue Sessions for Posting</b></li> <li><b>Contributor Relations &gt; Session Management &gt; Enter Memberships &gt; Queue Member Sessions</b></li> </ul> | 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.

| <i>Field or Control</i>     | <i>Description</i>  |
|-----------------------------|---|
| <b>Business Unit</b>        | Enter the business unit for the sessions to queue for posting.  |
| <b>Self Service Session</b> | Select the check box to note that the sessions contain gifts created as a result of self-service online giving.                         |
| <b>Select All</b>           | Select the check box next to each session to queue for posting. To select all sessions listed, click the Select All button.             |
| <b>Queue</b>                | 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.

|                      |        |
|----------------------|--------|
| <b><i>Tender</i></b> |        |
| Debit                | Credit |
| 100 USD              |        |

|                           |         |
|---------------------------|---------|
| <b><i>Designation</i></b> |         |
| 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.

|                          |        |
|--------------------------|--------|
| <b><i>Tender</i></b>     |        |
| Debit                    | Credit |
| 500 USD – Pledge Payment |        |

|                            |                          |
|----------------------------|--------------------------|
| <b>Accounts Receivable</b> |                          |
| Debit                      | Credit                   |
| 500 USD – Pledge           | 500 USD – Pledge Payment |

|                    |                  |
|--------------------|------------------|
| <b>Designation</b> |                  |
| 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.

---

|                         |                  |
|-------------------------|------------------|
| <b>Tender</b>           |                  |
| Debit                   | Credit           |
|                         | 1,000 USD (Gift) |
| 900 USD – Negate Gift   |                  |
| 100 USD – Adjusted Gift |                  |

|                         |                  |
|-------------------------|------------------|
| <b>Clearing Account</b> |                  |
| Debit                   | Credit           |
|                         | 900 USD - Refund |

|                         |                         |
|-------------------------|-------------------------|
| <b>Designation</b>      |                         |
| 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.

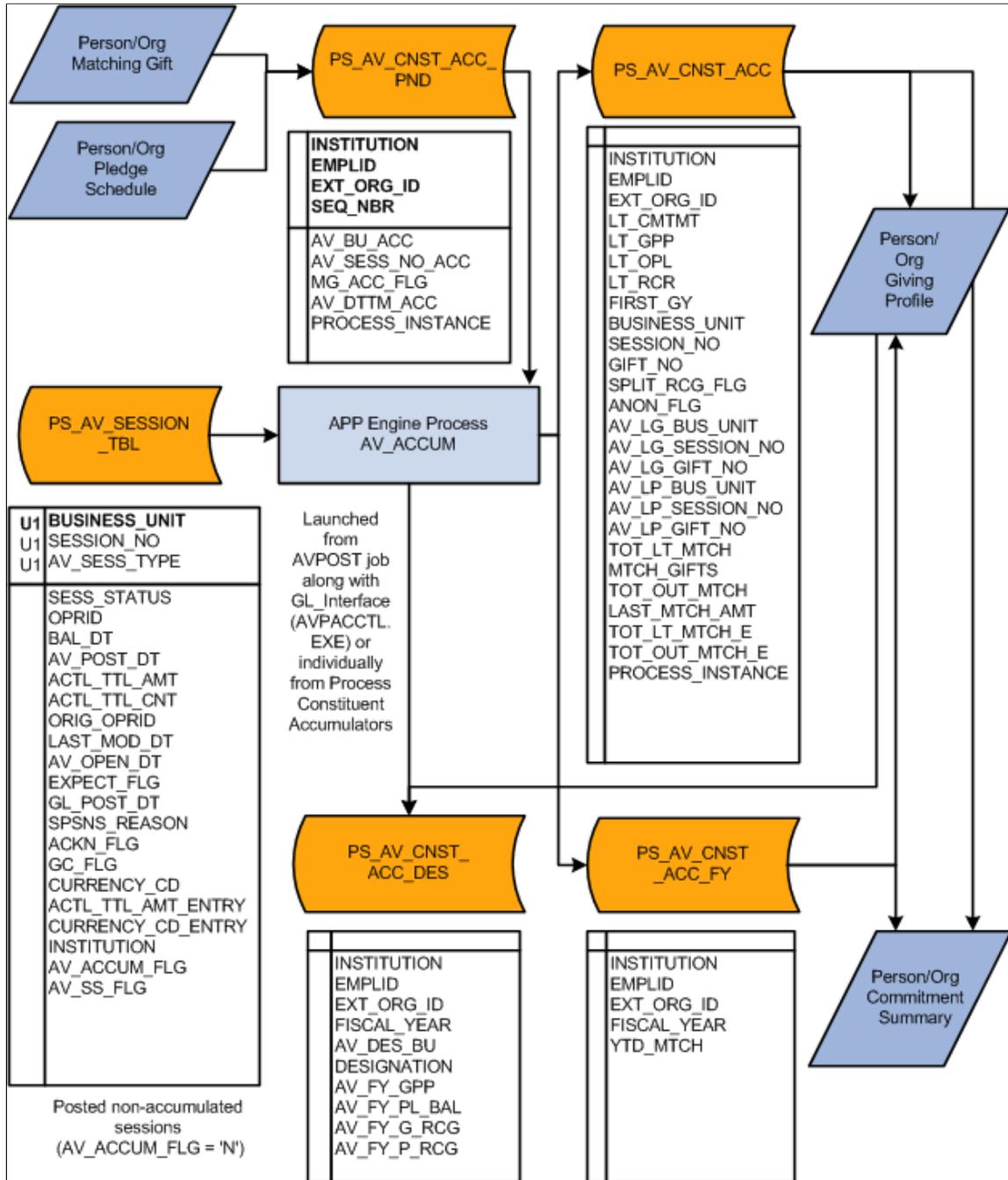
---

**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:

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  | <b>Contributor Relations</b> ><br><b>Session Management</b> ><br><b>Process Sessions</b> > <b>G/L Interface</b> | Process sessions and prepare them for journal entry in Financials. |

| <b>Page Name</b>   | <b>Definition Name</b> | <b>Navigation</b>   | <b>Usage</b>  |
|--|------------------------|---|---|
| GL Interface File Extract<br>(general ledger interface file extract) | AV_RUNCTL_ACTLN        | <b>Contributor Relations</b> ><br><b>Session Management</b> ><br><b>Process Sessions</b> > <b>G/L Interface File Extract</b>  | Manually generate a flat file containing data from AV_ACCTG_LN to be exported to Financials.                            |
| Constituent Accumulators   | AV_RUNCTL_ACCUM        | <b>Contributor Relations</b> ><br><b>Session Management</b> ><br><b>Process Sessions</b> ><br><b>Constituent Accumulators</b> | 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.

---

| <b>Field or Control</b>   | <b>Description</b>  |
|---------------------------|---|
| <b>Journal Template</b>   | Enter a journal template. These values are defined by your institution and determine how data is mapped to Financials.<br><br>See <a href="#">Preparing for Session Posting</a> . |
| <b>Commit Level</b>       | Determine how many sessions are processed before the system commits the transactions to your financial system.  |
| <b>Financials Release</b> | 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.

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Process Instance</b> | 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.

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Business Unit</b>    | 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

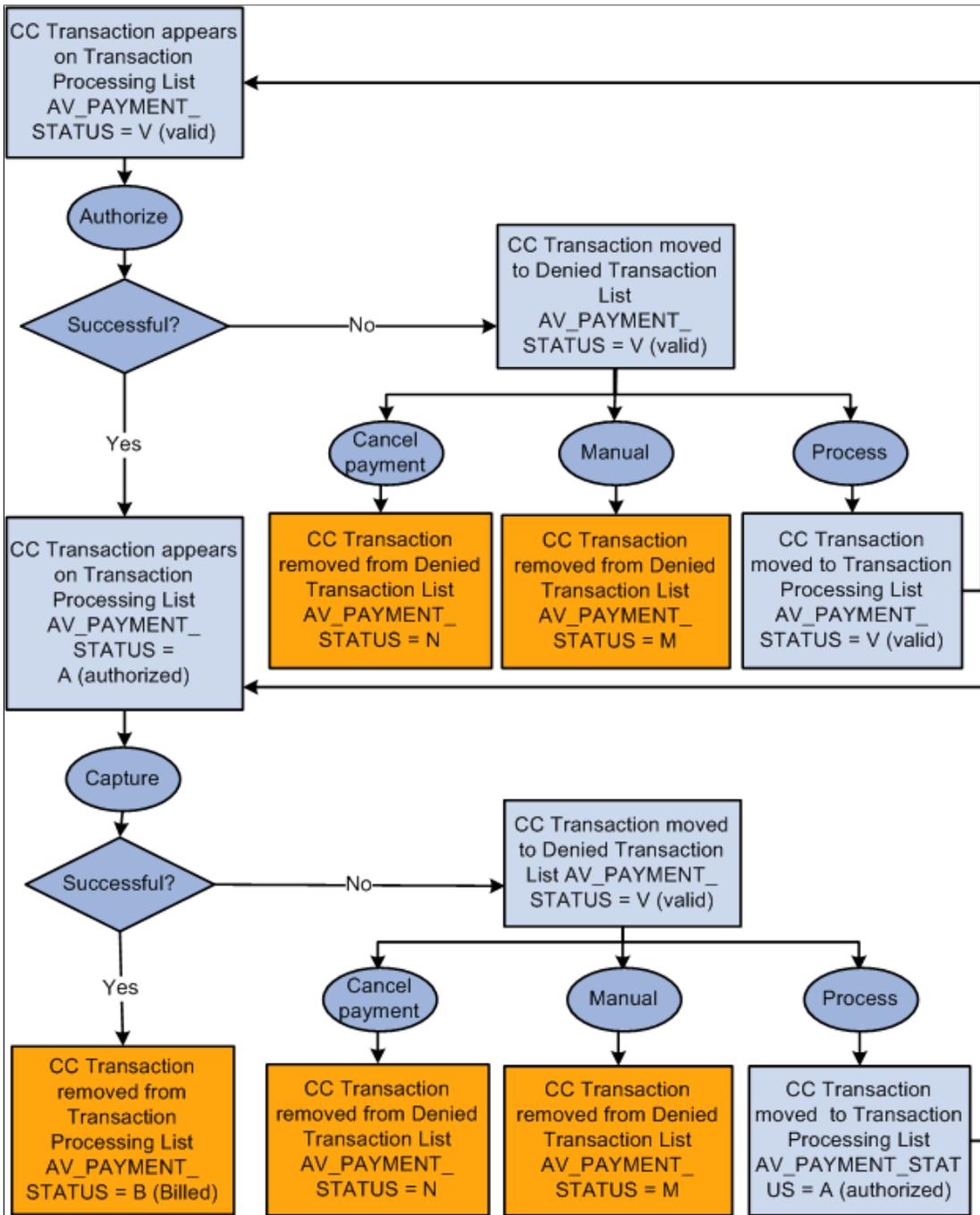
Issues a refund to a customer's credit card account after an adjusted gift or membership.

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.

| <b>Status Value</b>       | <b>Definition</b>  |
|---------------------------|--|
| <i>V</i> (valid)          | Upon entry of successfully validated credit card information on the credit card entry page, the AV_EP_GIFT_DTL or AV_EP_MBR_DTL tables initialize the AV_PAYMENT_STATUS field to <i>V</i> for this transaction. The transaction is ready for initial processing. The prerequisite to authorize gift or membership transactions is to have a value in the AV_PAYMENT_STATUS field of <i>V</i> . |
| <i>A</i> (authorized)     | After successful authorization from the third-party payment processor, the system sets the value of the AV_PAYMENT_STATUS field for the gift or membership transaction (AV_EP_GIFT_DTL or AV_EP_MBR_DTL table) to <i>A</i> . The prerequisite to capture a gift or membership transaction is to have an AV_PAYMENT_STATUS value of <i>A</i> .  |
| <i>B</i> (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 <i>B</i> . After a transaction is captured, it is considered complete and no longer shows up on the EP Transaction Processing - Filter Options page.  |
| <i>P</i> (pending credit) | After a gift or membership transaction has been adjusted, 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 <i>P</i> for this transaction. The transaction is ready to be credited.                  |
| <i>C</i> (refunded)       | A transaction has an AV_PAYMENT_STATUS value of <i>C</i> as a successful result of selecting the transactions after filtering on a Transaction Requested value of <i>Credit</i> on the EP Processing Transaction - Filter Options page and processing these transactions through a third-party credit card processor.  |
| <i>D</i> (denied)         | After a transaction is sent to the third-party payment processor, if the system generates a message declining the transaction, the system updates the AV_PAYMENT_STATUS field to <i>D</i> for this transaction. Denied transactions are then ready to be viewed and selected from the EP Denied Transactions page.   |
| <i>N</i> (cancelled)      | A transaction has an AV_PAYMENT_STATUS value of <i>N</i> as a result of the adjustment process or as a result of selecting the transaction and running the Cancel Pmt process through the EP Denied Transactions - Transaction List page.  |
| <i>M</i> (manual)         | A transaction has an AV_PAYMENT_STATUS value of <i>M</i> as a result of selecting the transaction and running the Manual process through the EP Denied Transactions - Transaction List page. If a transaction is flagged as Manual, all subsequent adjustments to the transaction also need to be Manual.  |

The following graphic illustrates the steps involved in processing gift and membership credit card transactions.

This graphic provides a summary process flow for electronic payment transaction processing:



## Pages Used to Process Credit Card Transactions

| <i>Page Name</i>                             | <i>Definition Name</i>       | <i>Navigation</i>  | <i>Usage</i>  |
|--|------------------------------|--|---|
| EP Transaction Processing - Filter Options   | AV_EP_FLTR                   | <b>Contributor Relations</b> > <b>Session Management</b> > <b>Process Electronic Payments</b> > <b>EP Transaction Processing (to select gifts)</b> | Enter your selection criteria for the gifts or member transactions to process.  |
| EP Transaction Processing - Transaction List | AV_EP_G_PROC<br>AV_EP_M_PROC | Click the <b>Search</b> 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**).

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.

**EP Transaction Processing**

**Filter Options**

\*Institution:  PeopleSoft University

Business Unit:

Tender Type:

Transaction Requested:  Search

---

**Item**

|  |   |   |
|--|---|---|
| <p><b>Self Service Session</b></p> <p><input checked="" type="radio"/> All Sessions</p> <p><input type="radio"/> Only Self Service</p> <p><input type="radio"/> Non Self Service</p> | <p><b>Post Date</b></p> <p>From <input type="text" value="11/05/2004"/> </p> <p>To <input type="text" value="11/05/2004"/> </p> | <p>Session Number: <input type="text"/> </p> <p>Gift: <input type="text"/> </p> |
|--|---|---|

| <i>Field or Control</i> | <i>Description</i>         |
|-------------------------|----------------------------|
| <b>Institution</b>      | Enter an institution code. |

| <b>Field or Control</b>                        | <b>Description</b>   |
|--|--|
| <b>Business Unit</b>                           | <p>Enter a business unit for the gift or membership transactions to process. This field cannot be left empty because <b>Transaction Requested</b> field values are dependent on the business unit specified.</p> <hr/> <p><b>Note:</b> 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.</p> <hr/>     |
| <b>Tender Type</b>                             | <p>Enter the electronic processing tender type for the gift or membership transactions to process.</p> <hr/> <p><b>Note:</b> The example above uses <i>CC</i> to designate this electronic payment tender type. However, you can define it as anything using the Tender Types page.</p> <hr/>  |
| <b>Transaction Requested</b>                   | <p>There are four credit card transaction processes currently supported by CyberSource: <i>Authorize</i>, <i>Capture</i>, <i>Authorize and Capture</i>, and <i>Credit</i>. Select the appropriate transaction for the processing step to complete.</p>   |
| <b>Self Service Session</b>                    | <p>Select the type of session to process:</p> <p><i>All Sessions:</i> to select gifts and memberships made through both Contributor Relations and Involvement self-service pages.</p> <p><i>Only Self Service:</i> to select gifts made through the self-service Make a Donation pages only.</p> <p><i>Non Self Service:</i> to select gifts made through Contributor Relations non self-service pages only.</p> |
| <b>Post Date</b>                               | <p>Enter both <b>From</b> and <b>To</b> dates to select gifts or memberships posted within the range.</p>  |
| <b>Session Number</b>                          | <p>Enter a session number to select gifts made in this specific session only. To display a session, you must enter a business unit.</p>  |
| <b>Gift</b>                                    | <p>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.</p>  |
| <b>Mbr Pmt Nbr</b> (membership payment number) | <p>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.</p>  |

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Search</b>           | 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**.

| <b>Field or Control</b>                 | <b>Description</b>   |
|---|--|
| <b>Select and Select All</b>            | Select the check box for each row to process, or click the Select All button to select all rows on the page.   |
| <b>Payment Status</b>                   | 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.<br><br>See <a href="#">Understanding Credit Card Transaction Processing</a> . |
| <b>Auth Dt</b> (authorization date)     | When the transaction is authorized, the system populates this field.   |
| <b>Reference Nbr</b> (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.   |
| <b>Gift Amt</b> (gift amount)           | If the transaction is a gift, displays the amount of the gift credit card transaction.   |
| <b>Mbr Dues</b> (membership dues)       | If the transaction is a membership, displays the amount of the membership credit card transaction.   |

| <b>Field or Control</b>   | <b>Description</b>  |
|---------------------------|---|
| <b>Process</b>            | Click to run the authorization process. The system gathers the transactions you select and sends them to the third-party credit card processor.<br><hr/> <b>Important!</b> After you click the Process button, give the process at least 30 seconds to run. <hr/> |
| <b>Set Filter Options</b> | 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:

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.

| <b>EP Transaction Processing</b>  |   |
|---|---|
| <b>Transaction List</b>   |   |
| <b>Institution:</b>   | PSUNV PeopleSoft University   |
| <b>Transaction Requested:</b>   | Credit  |
| <b>Self Service Session:</b>  | All Sessions <a href="#">Process Monitor</a> <a href="#">Set Filter Options</a> |
| No records found. Return to the filter options to change the page criteria. |   |

**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

| <i>Page Name</i>                | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>  |
|---------------------------------|------------------------|--|---|
| Purge Gift Security Codes       | AV_RUN_CVPURGE         | <b>Contributor Relations &gt; Session Management &gt; Process Electronic Payments &gt; Purge Gift Security Codes</b>   | Periodically purge credit card security codes from the system that are associated with gifts.               |
| Purge Membership Security Codes | AV_RUN_CVPURGE         | <b>Contributor Relations &gt; Session Management &gt; Process Electronic Payments &gt; Purge Member Security Codes</b> | 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

| <i>Page Name</i>                 | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>  |
|----------------------------------|------------------------|--|---|
| EP Run Review                    | AV_EP_RUN_DETAIL       | <b>Contributor Relations</b> ><br><b>Session Management</b> ><br><b>Process Electronic Payments</b> > <b>EP Run Review</b> | Enter run parameters and generate the EP Processing Audit report (AV704). |
| EP Run Review - Transaction List | AV_EP_TRAN_RUN_LOG     | Click the <b>Process Instance</b> 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**).

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.

### EP Run Review

Run Control ID: AV704 [Report Manager](#) [Process Monitor](#) Run

---

#### EP Processing Audit

Process Instance:  \*Academic Institution:

Transaction Requested: Capture

Run Date/Time: 11/30/09 8:40:29PM

---

#### Process Details

Customize | Find | View All | First 1-5 of 5 Last

| Select                   | Process Instance     | Session Type | Run Date/Time        | Process Run Status | Transaction Requested | Request Status |  |
|--------------------------|----------------------|--------------|----------------------|--------------------|-----------------------|----------------|--|
| <input type="checkbox"/> | <a href="#">2103</a> | Gift         | 11/30/2009 8:40:29PM |                    | Capture               | Success        |  |
| <input type="checkbox"/> | <a href="#">2102</a> | Gift         | 11/30/2009 8:38:20PM |                    | Authorize             | Success        |  |
| <input type="checkbox"/> | <a href="#">1705</a> | Member       | 11/18/2009 7:23:51PM |                    | Capture               | Success        |  |
| <input type="checkbox"/> | <a href="#">1703</a> | Member       | 11/18/2009 7:14:33PM |                    | Authorize             | Success        |  |
| <input type="checkbox"/> | <a href="#">1504</a> | Gift         | 11/17/2009 7:36:54PM |                    | Capture               | Success        |  |

Delete

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

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Process Instance</b> | 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.                       |
| <b>Request Status</b>   | Values for this field are <i>Success</i> and <i>Exception</i> . An exception status means that at least one transaction in the instance did not return with the status you requested. |

| <b>Field or Control</b>   | <b>Description</b>   |
|---|--|
| <b>Delete</b>   | 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

| <i>Page Name</i>                          | <i>Definition Name</i>       | <i>Navigation</i>   | <i>Usage</i>   |
|---|------------------------------|---|--|
| EP Denied Transactions - Filter Options   | AV_EP_FLTR                   | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Session Management &gt; Process Electronic Payments &gt; EP Denied Transactions</b></li> <li>• <b>Contributor Relations &gt; Session Management &gt; Process Electronic Payments &gt; EP Denied Member Transactions</b></li> </ul> | Enter your selection criteria for the gifts or member transactions to process.   |
| EP Denied Transactions - Transaction List | AV_EP_G_PROC<br>AV_EP_M_PROC | Click the <b>Search</b> 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**).

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.

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### Related Links

[Authorizing Gift and Membership Transactions](#)

[Capturing Gift and Membership Transactions](#)

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## 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

| <i>Page Name</i>                              | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|---|------------------------|---|--|
| EP Transaction Log Inquiry - Filter Options   | AV_EP_LOG_FLTR         | <b>Contributor Relations</b> ><br><b>Session Management</b> ><br><b>Process Electronic Payments</b> > <b>EP Transaction Log Inquiry</b> | Enter your selection criteria for the gifts or membership transactions to review.                                  |
| EP Transaction Log Inquiry - Transaction List | AV_EP_TRANS_LOG        | Click the <b>Search</b> 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**).

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).

| <i>Field or Control</i>      | <i>Description</i>  |
|------------------------------|---|
| <b>Reference Number</b>      | The system populates this field by default with a system-generated reference number used to communicate with the third-party credit card processor. |
| <b>Sequence Number</b>       | Indicates how many actions the system has taken on a particular reference number.   |
| <b>Payment Status</b>        | Click the link to view system action details that relate to this transaction.   |
| <b>Credit Card Message 1</b> | 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.

| <i>Field or Control</i>   | <i>Description</i>   |
|---|--|
|  | 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.  |

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.

|                                      |  |                         |            |
|--------------------------------------|--|-------------------------|------------|
| <b>Reference Number:</b>             | 000000000000002  | <b>Gift Number:</b>     |            |
| <b>Sequence number:</b>              | 1  | <b>Member Payment:</b>  |            |
| <b>Transaction Date:</b>             | 11/17/2009   | <b>ID:</b>              | KU0007     |
| <b>Business Unit:</b>                | MEDBU  |                         |            |
| <b>Session Number:</b>               |  | <b>Gift Amount:</b>     | 345.00 USD |
| <b>Tender Type:</b>                  | CC   | <b>Dues Amount:</b>     | USD        |
| <b>Payment Status:</b>               | Authorized   | <b>Sequence Number:</b> | 1          |
| <b>Credit Card Type:</b>             | VISA   |                         |            |
| <b>Credit Card Number:</b>           | *****Last Four Digits:   |                         | 1111       |
| <b>Expiration Date:</b>              | 01 / 2010  |                         |            |
| <b>Credit Card First Name:</b>       | Betty  |                         |            |
| <b>Credit Card Last Name:</b>        | Locherty   |                         |            |
| <b>Service Provide:</b>              | Cybersource  |                         |            |
| <b>Credit Card Request ID:</b>       | 2585137275320008430595   |                         |            |
| <b>Request Token:</b>                | Ahj/7wSRGEf5HoS8I6gGIkGzhkyauXDRqxsV4TlvRTdx5yrwACm7jzl<br>XeNIIQ2JI0wyW6YBay4guBORGEf5HoS8I6gGAwl54 |                         |            |
| <b>Authorization Datetime:</b>       | 2009-11-17-19.08.47.   |                         |            |
| <b>Return Status:</b>                | 0  |                         |            |
| <b>Authorization Reply:</b>          | SUCCESS  |                         |            |
| <b>Transaction Reference Number:</b> |  |                         |            |
| <b>Authorization Code:</b>           | 888888   | <b>Auth Date:</b>       | 11/17/2009 |
| <b>AVS Code:</b>                     | X  |                         |            |
| <b>Return Message:</b>               | Transaction was successful.  |                         |            |
| <b>Country:</b>                      | USA  |                         |            |
| <b>Address Line 1:</b>               | 643 Robinson St  |                         |            |
| <b>Address Line 2:</b>               |  |                         |            |
| <b>Address Line 3:</b>               |  |                         |            |
| <b>City:</b>                         | Buffalo  |                         |            |
| <b>State:</b>                        | NY   | <b>Postal Code:</b>     | 74940      |
| <b>Last Update Date/Time:</b>        | 11/17/09 7:08:47PM   |                         |            |
| <b>Last Update User ID:</b>          | PS   |                         |            |
| <b>Process Instance:</b>             |  |                         |            |

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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>  |
|------------------|------------------------|--|---|
| Accounting Line  | AV_ACCTG_LN_INQ        | <b>Contributor Relations</b> ><br><b>Session Management</b> ><br><b>Supervise Sessions</b> ><br><b>Accounting Line Summary</b> | 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**).

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.

**Accounting Line**

**Business Unit:** MEDBU Medical Business Unit

**Search/Match**

**Person**

**External Organization**

**Session Number**

**Run Date and Sequence Number**

| Customize   Find   View All   First 1-6 of 11 Last |                |                     |                      |                     |                 |                 |                 |
|--|----------------|---------------------|----------------------|---------------------|-----------------|-----------------|-----------------|
| General Information 1                              |                | Journal Information | Currency Information | Session Information | GL Chartfield 1 | GL Chartfield 2 |                 |
| Session Hbr  | Name           | Ledger              | General Ledger Unit  | Account             | Department      | Project/Grant   | Accounting Date |
| 1 170  | Crosbie,Edward | ACTUALS             | PSUNV                | 400000              | LAS             |                 | 06/04/2006      |
| 2 170  | Crosbie,Edward | ACTUALS             | PSUNV                | 110000              | LAS             |                 | 06/04/2006      |
| 3 170  | Crosbie,Edward | ACTUALS             | PSUNV                | 110000              | LAS             | LIBRARY         | 06/04/2006      |
| 4 171  | Crosbie,Edward | ACTUALS             | PSUNV                | 110000              | LAS             | LIBRARY         | 06/04/2006      |
| 5 171  | Crosbie,Edward | ACTUALS             | PSUNV                | 300000              | LAS             | LIBRARY         | 06/04/2006      |
| 6 173  | Crosbie,Edward | ACTUALS             | PSUNV                | 400000              | LAS             |                 | 06/04/2006      |

**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.

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Person</b>           | 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. |

| <b>Field or Control</b>             | <b>Description</b>   |
|-------------------------------------|--|
| <b>External Organization</b>        | 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.   |
| <b>Session Number</b>               | 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.   |
| <b>Run Date and Sequence Number</b> | 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](#)

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## Viewing Suspended Sessions

This section discusses how to view information about suspended sessions.

## Page Used to View Suspended Sessions

| <b>Page Name</b>   | <b>Definition Name</b> | <b>Navigation</b>  | <b>Usage</b>  |
|--------------------|------------------------|--|---|
| Suspended Sessions | AV_SPSN_SESSION        | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Session Management &gt; Supervise Sessions &gt; Suspended Sessions</b></li> <li>• <b>Contributor Relations &gt; Session Management &gt; Supervise Sessions &gt; Membership Sessions &gt; Suspended Membership Sessions</b></li> </ul> | 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.

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Suspense Reason</b>  | Displays the reason the system suspended the session. The following table lists the possible suspense reasons and their corresponding messages. |

| <b>Reason</b>  | <b>Message</b>   |
|--|--|
| If a Contributor Relations Clearing Account Item Type is not set up correctly  | Clearing Acct ITEM_TYPE Missing for <i>Institution</i> |
| If the Gift Total does not equal zero after subtracting each of the designation/recognition totals for the gift                  | Gift Amt of Gift <i>Number</i> not distributed         |
| If the Adjusted Gift Total does not equal zero after subtracting each of the designation/recognition totals for an adjusted gift | Adjust Amt of Gift <i>Number</i> not distributed       |
| If the Pledge Total does not equal zero after subtracting each of the designation/recognition totals for a pledge                | Pledge Amt of Pledge <i>Number</i> not distributed     |

| <b>Reason</b>  | <b>Message</b>  |
|--|---|
| If the Adjusted Pledge Total does not equal zero after subtracting each of the designation/recognition totals for an adjusted Pledge | Adjust Amt of Pledge <i>Number</i> not distributed    |
| If the Membership Total does not equal zero after subtracting each of the designation/recognition totals for a membership            | Total Amt of Membership <i>Number</i> not distributed |
| If the Adjusted Membership Total does not equal zero after subtracting each of the designation/recognition totals for a membership   | Adjust Amt of membership not distributed              |
| 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.

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Open</b>             | <p>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.</p> <p>To correct the setup values, go to the appropriate page – Item Type, Designation Funds, Tender Type, or CR Business Unit – and make the change.</p> |

## 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

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|------------------|------------------------|--|--|
| Session Filter   | AV_SESS_FLTR           | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Session Management &gt; Supervise Sessions &gt; Session Summary &gt; Session Filter</b></li> <li>• <b>Contributor Relations &gt; Session Management &gt; Supervise Sessions &gt; Membership Sessions &gt; Membership Session Summary &gt; Session Filter</b></li> </ul> | Select criteria to narrow the number of sessions you view on the Session Summary page. |

| <i>Page Name</i> | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>                                 |
|------------------|------------------------|---|--|
| Session Summary  | AV_SESS_SMRY           | <ul style="list-style-type: none"> <li>Contributor Relations &gt; Session Management &gt; Supervise Sessions &gt; Session Summary &gt; Session Summary</li> <li>Contributor Relations &gt; Session Management &gt; Supervise Sessions &gt; Membership Sessions &gt; Membership Session Summary</li> </ul> | View information about sessions.             |
| Transfer         | AV_SESS_TRSFR_SP       | Click the <b>Transfer Session</b> 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**).

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.

The screenshot shows the 'Session Filter' page with the following fields and controls:

- Institution:** PSUNV PeopleSoft University
- Business Unit:** MEDBU
- User ID:** PS
- Session Status:** Open
- Session Type:** (Dropdown menu)
- Self Service Session:**
- Search:** Search button

**Item** section:

|                      | From                 | To                   |
|----------------------|----------------------|----------------------|
| Date Opened:         | <input type="text"/> | <input type="text"/> |
| Post Date:           | <input type="text"/> | <input type="text"/> |
| Balance Date:        | <input type="text"/> | <input type="text"/> |
| Actual Total Count:  | <input type="text"/> | <input type="text"/> |
| Actual Total Amount: | <input type="text"/> | <input type="text"/> |

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Business Unit</b>    | Enter the business unit for which to view session information. |

| <b>Field or Control</b>                           | <b>Description</b>   |
|---|--|
| <b>Session Status</b>                             | <p>Select a valid session status, such as <i>Open</i>, <i>Balanced</i>, <i>Posted</i>, <i>Queued</i>, or <i>Suspense</i>. If you do not specify a session status, the Session Summary page displays all sessions, regardless of session status.</p> <p>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.</p>   |
| <b>User ID</b>                                    | <p>Displays the ID of the person who controls the session.</p> <hr/> <p><b>Note:</b> This field is only available for selection if you are a gift and pledge supervisor; otherwise, your user ID appears here.</p> <hr/>   |
| <b>Session Type</b>                               | <p>Select a valid session type, such as <i>Gift</i>, <i>Pledge</i>, <i>Gift Adjustment</i>, <i>Pledge Adjustment</i>, <i>Member</i>, or <i>Member Adjustment</i>. If you do not specify a session type, the Session Summary page displays all sessions, regardless of session type.</p> <p>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.</p>  |
| <b>Self Service Session</b>                       | <p>Select to filter for gifts made through the Involvement online giving process.</p>  |
| <b>Date Opened, Post Date, and Balance Date</b>   | <p>Enter a date opened, post date and balance date range. Select the earliest date in the range from the <b>From</b> prompt box, and the latest date in the range from the <b>To</b> 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.</p> <hr/> <p><b>Important!</b> To filter transactions for an exact date, enter the same value in both the from and to fields.</p> <hr/> |
| <b>Actual Total Count and Actual Total Amount</b> | <p>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.</p>  |

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Search</b>           | <p>Click to retrieve a list of results matching your selection criteria.</p> <hr/> <p><b>Note:</b> The Maximum Retrieval value, set on the Institution Installation page, determines the maximum number of results returned per search.</p> |

## Viewing a Session Summary

Access the Session Summary page (**Contributor Relations > Session Management > Supervise Sessions > Session Summary > Session Summary**).

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.

| Session Filter      |                     | Session Summary             |              |                      |         |               |              |           |              |               |  |                          |
|---------------------|---------------------|-----------------------------|--------------|----------------------|---------|---------------|--------------|-----------|--------------|---------------|--|--------------------------|
| <b>Institution:</b> |                     | PSUNV PeopleSoft University |              |                      |         |               |              |           |              |               |  |                          |
| <b>Total Count:</b> |                     | 3                           |              | <b>Total Amount:</b> |         | 16,344.35 USD |              |           |              |               |  |                          |
| Expected            | Session Number      | Business Unit               | Session Type | Session Status       | User ID | Date Opened   | Balance Date | Post Date | Actual Count | Actual Amount |  | Self Service Session     |
| Expected            | <a href="#">123</a> | MEDBU                       | Gift Adj     | Open                 | PS      | 10/22/2001    |              |           |              | 0.00 USD      |  | <input type="checkbox"/> |
| Expected            | <a href="#">125</a> | MEDBU                       | Gift         | Open                 | PS      | 10/22/2001    |              |           | 1            | 344.35 USD    |  | <input type="checkbox"/> |
| Expected            | <a href="#">127</a> | MEDBU                       | Pledge Adj   | Open                 | PS      | 10/22/2001    |              |           | 1            | 15,000.00 USD |  | <input type="checkbox"/> |
| Expected            | <a href="#">162</a> | MEDBU                       | Gift         | Open                 | PS      | 11/05/2004    |              |           | 1            | 1,000.00 USD  |  | <input type="checkbox"/> |

If you are a Gift and Pledge Supervisor, you can reopen and transfer sessions using this page.

| <b>Field or Control</b>     | <b>Description</b>   |
|-----------------------------|--|
| <b>Expected</b>             | <p>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.</p> <p>See <a href="#">Reopening and Editing Expected Counts and Amounts for Sessions</a>.</p> |
| <b>Self Service Session</b> | <p>Indicates the gifts in the session that were created as a result of online giving.</p>  |

## Related Links

[Initializing and Balancing the Session](#)

## 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.

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Operator ID</b>      | 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.

---

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.

---



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## 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" (Campus Community Fundamentals)

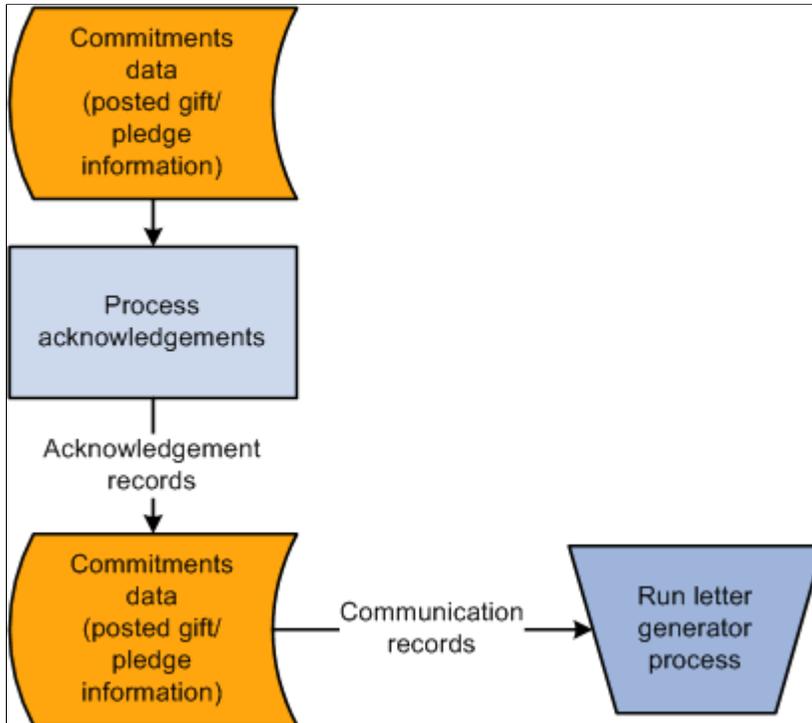
---

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:

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:

|             | <i><b>Donor</b></i> | <i><b>Spouse</b></i> |
|-------------|---------------------|----------------------|
| 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:

|             | <i><b>Donor</b></i> | <i><b>Spouse</b></i> |
|-------------|---------------------|----------------------|
| 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:

|             | <i>Donor</i> | <i>Spouse</i> |
|-------------|--------------|---------------|
| Hard Credit | 100 percent  | 0 percent     |
| Soft Credit | 0 percent    | 100 percent   |

The donor and spouse receive a joint receipt for 1,000 USD. Depending on the acknowledgement rules you set up and whether the Acknowledge Soft Credit check box is selected on the Institution Installation 2 page, they may also receive a joint acknowledgement for 1,000 USD.

---

**Note:** We recommend that you use this configuration to ensure sending the appropriate acknowledgement letter for the highest hard credit recognized. The system adds hard credits for joint records together, but the letter code for the acknowledgement is selected based on an individual's hard credit rather than the joint hard credit calculation.

---

If a joint relationship does not exist between a donor and spouse and you set the following defaults:

|             | <i>Donor</i> | <i>Spouse</i> |
|-------------|--------------|---------------|
| 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" \(Campus Community Fundamentals\)](#)

[Setting Up Institution Defaults](#)

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## Processing Acknowledgement Letters

This section discusses how to automatically process acknowledgment letters.

## Page Used to Process Acknowledgement Letters

| <i>Page Name</i>         | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|--------------------------|------------------------|---|---|
| Process Acknowledgements | AV_RUNCTL_ACKNLDG      | <b>Contributor Relations</b> ><br><b>Session Management</b> ><br><b>Acknowledgements</b> ><br><b>Process Acknowledgements</b> | 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**).

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Business Unit</b>    | Enter the business unit for which to process acknowledgements.  |
| <b>Commit Level</b>     | 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.

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## 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" (Campus Community Fundamentals)

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" (Campus Community Fundamentals).

## 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" (Campus Community Fundamentals)

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

| <i>Page Name</i>       | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|------------------------|------------------------|---|--|
| Acknowledge Suspense   | AV_ACKNLDG_SPSNS       | <b>Contributor Relations</b> ><br><b>Session Management</b> ><br><b>Acknowledgements</b> ><br><b>Acknowledge Suspense</b> | 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        | <b>Contributor Relations</b> ><br><b>Session Management</b> ><br><b>Acknowledgements</b> ><br><b>Acknowledgement List</b> | 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 <b>Process</b> button on the Acknowledgement Suspense or Acknowledgement List page.                             | Process acknowledgements letters that were placed in suspense or assigned to you.  |

| <b>Page Name</b> | <b>Definition Name</b> | <b>Navigation</b>  | <b>Usage</b>   |
|------------------|------------------------|--|--|
| Transfer         | AV_ACKNLDG_TRNS_SP     | Click the <b>Transfer</b> 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**).

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.

**Acknowledge Suspense**

**Institution:** PSUNV PeopleSoft University

Customize | Find | View All | First 1-6 of 26 Last

| Select                              | Gift Nbr | Acknowledgement Type | ID     | Constituent     | Suspense Reason | Process Button |
|-------------------------------------|----------|----------------------|--------|-----------------|-----------------|----------------|
| <input type="checkbox"/>            | 217      | Pledge               | AV0036 | Sargent,Russell | Gift Amount     | Process Button |
| <input type="checkbox"/>            | 218      | Pledge               | AV0036 | Sargent,Russell | Gift Amount     | Process Button |
| <input checked="" type="checkbox"/> | 219      | Pledge               | AV0044 | Liendo,Ramon    | Gift Amount     | Process Button |
| <input type="checkbox"/>            | 223      | Pledge               | AV0036 | Sargent,Russell | Gift Amount     | Process Button |
| <input type="checkbox"/>            | 224      | Pledge               | AV0036 | Sargent,Russell | Gift Amount     | Process Button |
| <input checked="" type="checkbox"/> | 225      | Pledge               | AV0044 | Liendo,Ramon    | Gift Amount     | Process Button |

**Transfer**

**All** Workset:  Description:  Method:  **Build**

**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.

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Select</b>           | Select each record for which to transfer acknowledgements.                        |
| <b>Process</b>          | Click to process acknowledgement letters on the Acknowledgement Detail Page.      |
| <b>Transfer</b>         | 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.

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Standard</b>         | 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.   |
| <b>Custom</b>           | 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. |
| <b>None</b>             | 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.  |

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**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.

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## 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**).

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.

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Select</b>           | Select each record for which to transfer acknowledgements.                        |
| <b>Process</b>          | Click to process acknowledgement letters on the Acknowledgement Detail Page.      |
| <b>Transfer</b>         | 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](#)

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## Managing Joint Communications

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**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" (Campus Community Fundamentals)

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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.

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**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.

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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" (Campus Community Fundamentals)

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## Handling Matching Gifts

This section provides an 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:

| <i>Ratio</i> | <i>Currency</i> | <i>From Amount</i> | <i>To Amount</i> |
|--------------|-----------------|--------------------|------------------|
| 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:

| <i>Ratio</i> | <i>Currency</i> | <i>From Amount</i> | <i>To Amount</i> |
|--------------|-----------------|--------------------|------------------|
| 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:

| <b>Ratio</b> | <b>Currency</b> | <b>From Amount</b> | <b>To Amount</b> |
|--------------|-----------------|--------------------|------------------|
| 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:

| <b>Ratio</b> | <b>Currency</b> | <b>From Amount</b> | <b>To Amount</b> |
|--------------|-----------------|--------------------|------------------|
| 2:1          | EUR             | 0                  | 1,000            |
| 1:1          | EUR             | 1,001              | 5,000            |

A gift of 500 EUR is made to the institution. A matching gift of 1,000 EUR is expected/received. The system converts the expected/received matching gift amount to USD as of the gift date.

### **Pages Used to Handle Matching Gifts**

| <b>Page Name</b>              | <b>Definition Name</b> | <b>Navigation</b>  | <b>Usage</b>  |
|-------------------------------|------------------------|--|---|
| Matching Gift Rules (inquiry) | AV_MTCH_RULES_INQ      | <ul style="list-style-type: none"> <li>Contributor Relations, Session Management, Matching Gifts, Matching Rules Details</li> <li>Contributor Relations, Constituent Information, Organizations, Matching Gift Rules, View Matching Rules, Rules</li> <li>Contributor Relations, Session Management, Matching Gifts, View Matching Rules - Workset, Rules</li> </ul> | 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. |

| <b>Page Name</b>   | <b>Definition Name</b>             | <b>Navigation</b>  | <b>Usage</b>  |
|--|------------------------------------|--|---|
| Outstanding Matching Gifts   | AV_MTCH_P_LIST<br>AV_MTCH_P_LIST_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Session Management &gt; Matching Gifts &gt; Person Matching Gift</b></li> <li>• <b>Contributor Relations &gt; Session Management &gt; Matching Gifts &gt; Matching Gifts - Workset</b></li> </ul> | 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                     | <b>Contributor Relations &gt; Session Management &gt; Matching Gifts &gt; Ext Org Matching Gift</b>  | 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                      | <b>Contributor Relations &gt; Analyze Giving History &gt; Person Giving Summaries &gt; Person Matching Gifts</b>   | View information about donors' gifts that are matched by external organizations.                |
| Ext Org Matching Gifts (external organization matching gifts)              | AV_MTCH_O_INQ                      | <b>Contributor Relations &gt; Analyze Giving History &gt; Organization Giving Summaries &gt; Ext Org Matching Gifts</b>  | 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**).

| <b>Field or Control</b>                                     | <b>Description</b>   |
|---|--|
| <b>Min Amt</b> (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.                                       |
| <b>MG Designation Type</b> (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. |

| <b>Field or Control</b>      | <b>Description</b>   |
|------------------------------|--|
| <b>Receipts</b>              | <p>Displays receipt options.</p> <p><i>Periodically:</i> receipts may be combined and sent to the organization periodically.</p> <p><i>Each Gift:</i> the organization requires a receipt from your institution for each company gift.</p> |
| <b>Distribution Schedule</b> | Displays the frequency with which organizations make matching gift payments to your institution.   |
| <b>Deadline Date</b>         | Displays the date on which a completed matching gift form must be received by the organization in order for it to match the gift.  |
| <b>Payroll Eligibility</b>   | Indicates the organization offers employees the option of having payroll deduction gifts matched through its matching gift program.  |
| <b>Duplicate Match</b>       | Indicates the organization matches gifts that are matched by other organizations.  |

### Annual Matching Gift Budget

| <b>Field or Control</b>        | <b>Description</b>  |
|--------------------------------|---|
| <b>Overall Total</b>           | 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. |
| <b>Donor/Institution Total</b> | Displays the maximum monetary amount the organization will match toward one donor's gifts to your institution this year   |
| <b>Institution Total</b>       | Displays the maximum monetary amount the organization will give to your institution in matching gift payments this year.  |
| <b>Donor Total</b>             | 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

| <i>Field or Control</i>                              | <i>Description</i>  |
|--|---|
| <b>Ratio</b> and To Ratio                            | Displays the formula by which an organization calculates its matching amount for each regular donor gift to your institution. |
| <b>Minimum Match Amount</b> and Maximum Match Amount | Displays amounts used in the automatic calculation of the expected matching gift amount.                                      |

## Restrictions

| <i>Field or Control</i>             | <i>Description</i>  |
|-------------------------------------|---|
| <b>Ineligible Designation Types</b> | Displays the designation types that are not eligible for an organization's matching gift program.                           |
| <b>Ineligible Gift Types</b>        | Displays the certain gift types that the organization will not match.   |
| <b>Eligible Alumni Status</b>       | Displays the status a donor must have as a formal student of your institution in order for the organization to match gifts. |
| <b>Eligible Employee Status</b>     | 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**).

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Business Unit</b>    | 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. |

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Gift Number</b>      | Click a gift number link to view detailed information about a particular gift on the Gift Detail page.    |
| <b>Process Date</b>     | Displays the date the matching gift form was submitted to the matching gift organization.                 |
| <b>Denied Date</b>      | If the matching gift is denied by the matching organization, enter the date that you received the denial. |
| <b>Details</b>          | 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.

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Business Unit</b>    | 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. |
| <b>Gift Number</b>      | Click a gift number link to view detailed information about a particular gift on the Gift Detail page.  |
| <b>Process Date</b>     | The date on which the matching gift is processed.   |
| <b>Denied Date</b>      | Enter the date on which the matching gift is denied if applicable.  |
| <b>Details</b>          | 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.

| <b>Field or Control</b>      | <b>Description</b>  |
|------------------------------|---|
| <b>Business Unit</b>         | Displays the business unit associated with the expected matching gift.  |
| <b>Gift Number</b>           | Click a gift number link to view detailed information about a particular gift on the Gift Detail page.                                  |
| <b>Gift Date</b>             | Displays the date on which the gift was made to your institution.   |
| <b>Expected Match Amount</b> | Displays the monetary amount you expect to receive as a matched gift from the organization for the donor's original gift.               |
| <b>Actual Match Amount</b>   | Displays the monetary amount actually received as a matching gift payment.  |
| <b>Denied Date</b>           | Displays the date on which the matching gift was denied, if applicable.   |
| <b>Details</b>               | 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](#).

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## 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

| <i>Page Name</i>       | <i>Definition Name</i>                           | <i>Navigation</i>  | <i>Usage</i>   |
|------------------------|--|--|--|
| Giving Club Membership | AV_GCLUB_MBR<br>AV_GCLUB_MBR_E<br>AV_GCLUB_MBR_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Session Management &gt; Giving Clubs &gt; Giving Club Membership</b></li> <li>• <b>Contributor Relations &gt; Session Management &gt; Giving Clubs &gt; Giving Club Membership - Org</b></li> <li>• <b>Contributor Relations &gt; Session Management &gt; Giving Clubs &gt; Giving Club Membership - Wkset</b></li> </ul> | Manually assign a donor to a giving club.  |
| Process Giving Clubs   | AV_RUNCTL_GCLUBS                                 | <b>Contributor Relations &gt; Session Management &gt; Giving Clubs &gt; Process Giving Clubs</b>   | Run the appropriate process to generate giving club memberships and calculate membership levels based on donors' giving. |

| <b>Page Name</b>               | <b>Definition Name</b>                           | <b>Navigation</b>  | <b>Usage</b>   |
|--------------------------------|--|--|--|
| Giving Club Progress           | AV_GCLUB_PRG<br>AV_GCLUB_PRG_E<br>AV_GCLUB_PRG_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Analyze Giving History &gt; Person Giving Summaries &gt; Giving Club Progress</b></li> <li>• <b>Contributor Relations &gt; Analyze Giving History &gt; Organization Giving Summaries &gt; Giving Club Progress - Org</b></li> <li>• <b>Contributor Relations &gt; Analyze Giving History &gt; Workset Giving Summaries &gt; Giving Club Progress</b></li> </ul> | View information about a donor's progression through giving clubs and various club levels at your institution. |
| Giving Club Summary            | AV_GCLUB_SMRY                                    | <b>Contributor Relations &gt; Session Management &gt; Giving Clubs &gt; Giving Club Summary</b>  | View a list of all the giving clubs at your institution.   |
| Giving Club Detail             | AVB_GCLUB_DTL_SP                                 | Click the <b>Details</b> link on the Giving Club Summary page.   | View additional information about a giving club.   |
| Giving Club Level Detail       | AV_GCLUB_LVL_SP                                  | Click the <b>Levels</b> button on the Giving Club Summary page.  | View information about each giving club level associated with the club.  |
| Giving Club Detail             | AV_GCLUB_DTL                                     | <b>Contributor Relations &gt; Session Management &gt; Giving Clubs &gt; Giving Club Detail</b>   | View detailed information about a giving club.   |
| Giving Club Levels             | AV_GCLUB_LVL_DTL                                 | <b>Contributor Relations &gt; Session Management &gt; Giving Clubs &gt; Giving Club Detail &gt; Giving Club Levels</b>   | View the associated membership levels for a giving club.   |
| Giving Club Membership Summary | AV_GCLUB_MBR_SMRY                                | <b>Contributor Relations &gt; Session Management &gt; Giving Clubs &gt; Giving Club Member Summary</b>   | 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**).

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.

### Giving Club Membership

Shawn Gallagher ID: AV0001

Constituent Type: [Alumni](#)
Year: [2001](#) PSUNV
Prospect Manager: Mario Capozzelli

Find | View All
First 1 of 1 Last

**Giving Club:**  Law Capital Campaign Club

**Fiscal Year:**

**Level:**  **Added By:** User

**Membership Date:**  **Last Update Timestamp:**

**Giving Club Status:**

**Amount:**  USD

**Description:**

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.

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Giving Club</b>      | Enter the giving club to which to assign the donor. Available options include valid giving clubs at your institution.  |
| <b>Fiscal Year</b>      | Enter the fiscal year for the giving club membership. This field populates by default to the current fiscal year, but can be changed.  |
| <b>Level</b>            | Enter the level within the giving club that the donor is qualified for. Level names are usually very specific for each institution and defined based on a donor's level of giving, but an example might include a giving club with levels of <i>Member</i> , <i>Associate</i> , <i>Sponsor</i> , and <i>Benefactor</i> . |
| <b>Membership Date</b>  | Enter the date on which the donor's membership in the giving club begins.  |

| <b>Field or Control</b>   | <b>Description</b>   |
|---------------------------|--|
| <b>Giving Club Status</b> | Select the current state of the donor's status in the giving club. Values for this field are <i>Member</i> or <i>Accruing</i> . Select <i>Member</i> to automatically add the donor to a giving club. <i>Accruing</i> indicates that the donor is still working toward membership eligibility at the level you selected. |
| <b>Amount</b>             | 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**).

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Institution</b>      | Enter the institution for which giving club records are generated.  |
| <b>Process Date</b>     | <p>Enter the date on which the process is run. This field populates by default to the current date.</p> <hr/> <p><b>Note:</b> 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.</p> <hr/> <p>See <a href="#">Defining Giving Clubs</a>.</p> |
| <b>Commit Level</b>     | 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.

| <b>Giving Club State</b>     | <b>Correct Processing Option(s)</b>                       |
|------------------------------|---|
| 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 |

| <b>Field or Control</b>               | <b>Description</b>   |
|---------------------------------------|--|
| <b>Unprocessed Sessions</b>           | <p>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.</p> <hr/> <p><b>Note:</b> You should always run this option prior to running either of the initializing options so that all gifts are included in the initialization process.</p>  |
| <b>Initialize Select Giving Clubs</b> | <p>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.</p> <p>See the note above to run unprocessed sessions first.</p> |

| <b>Field or Control</b>     | <b>Description</b>   |
|-----------------------------|--|
| Initialize All Giving Clubs | <p>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.</p> <p>See the note above to run unprocessed sessions first.</p> <hr/> <p><b>Warning!</b> Do not run this process at peak giving periods, since the system uses all existing giving records during processing.</p> <hr/> |

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.

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**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.

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### 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**).

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.

### Giving Club Progress

Shawn Gallegher ID: AV0001   

Constituent Type: [Alumni](#) Year: [2001](#) PSUNV Prospect Manager: Mario Capozzelli

Fiscal Year:   Status:

| Name                 | Level  | Amount       | Minimum  | Maximum |
|----------------------|--------|--------------|----------|---------|
| 1 Annual Giving Club | SILVER | 1,739.00 USD | 1,000.00 | 0.00    |

| <i>Field or Control</i> | <i>Description</i>   |
|-------------------------|--|
| <b>Fiscal Year</b>      | 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. |

| <b>Field or Control</b>    | <b>Description</b>  |
|----------------------------|---|
| <b>Status</b>              | Select the giving club status to view information about. Values are <i>Member</i> or <i>Accruing</i> . 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. |
| <b>Minimum and Maximum</b> | 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**).

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Levels</b>           | Click to view information about the giving club levels associated with each club on the Giving Club Level Detail page. |
| <b>Details</b>          | 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**).

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Fiscal Year</b>      | 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

| <i>Page Name</i>                                 | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|--|------------------------|--|--|
| CAE Report (Council for Aid to Education report) | AV_RUNCTL_CAE          | <b>Contributor Relations &gt; CR Reports &gt; Giving Reports &gt; CAE Report</b> | 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.

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**Important!** You *must* run AVPCAE before running GIFTINC, GIFTINCII, and GIFTINCIV in order for the report to populate correctly.

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### Related Links

[AVPCAE, GIFTINC, GIFTINCII, GIFTINCIV – CAE Gift Income Report](#)



# Analyzing Giving History

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## 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

| <b>Field or Control</b>     | <b>Description</b>  |
|-----------------------------|---|
| <b>Session Type</b>         | Select a session type from the prompt box. Valid session types include <i>Gift</i> , <i>Pledge</i> , <i>Member</i> , <i>Gift Adjustment</i> , <i>Pledge Adjustment</i> , and <i>Member Adjustment</i> . 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. |
| <b>Self Service Session</b> | Enables users to filter for commitment or transaction registers created as a result of an Involvement self-service session.   |

| <b>Field or Control</b> | <b>Description</b>  |
|-------------------------|---|
| <b>Credit Type</b>      | 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 <i>Hard Credit</i> , <i>Soft Credit</i> , and <i>Vehicle Credit</i> . Credit types, other than hard, are defined by your institution. |
| <b>Match</b>            | If you only want to view transactions that equal a specific amount, enter that amount.  |

## Pages Used to Analyze Giving History

| <b>Page Name</b>   | <b>Definition Name</b>           | <b>Navigation</b>  | <b>Usage</b>  |
|--|----------------------------------|--|---|
| Giving Profile   | AV_P_GPROFILE<br>AV_P_GPROFILE_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Analyze Giving History &gt; Person Giving Summaries &gt; Giving Profile</b></li> <li>• <b>Contributor Relations &gt; Analyze Giving History &gt; Workset Giving Summaries &gt; Giving Profiles - Workset</b></li> </ul> | View a summary of a donor's giving history.         |
| Giving Profile Org - Giving Profile (giving profile organization - giving profile) | AV_P_GPROFILE_E                  | <b>Contributor Relations &gt; Analyze Giving History &gt; Organization Giving Summaries &gt; Giving Profile - Org</b>  | View a summary of an organization's giving history. |

| <b>Page Name</b>           | <b>Definition Name</b>                              | <b>Navigation</b>  | <b>Usage</b>   |
|----------------------------|---|--|--|
| Commitment Summary         | AV_CMTMT_SMRY<br>AV_CMTMT_SMRY_E<br>AV_CMTMT_SMRY_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Analyze Giving History &gt; Person Giving Summaries &gt; Commitment Summary</b></li> <li>• <b>Contributor Relations &gt; Analyze Giving History &gt; Organization Giving Summaries &gt; Commitment Summary - Org</b></li> <li>• <b>Contributor Relations &gt; Analyze Giving History &gt; Workset Giving Summaries &gt; Commitment Summary - Workset</b></li> </ul> | 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 <b>Details</b> link on the Commitment Summary page.  | View information about a commitment.   |
| Account Details            | AV_ACCT_DTL_SP                                      | Click the <b>Designation Name</b> 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 <b>Details</b> link on the Commitment Summary Details page.  | View information about how a transaction is allocated to a designation.                                      |
| Commitment Register Filter | AV_CMTMT_TRNS_FLTR                                  | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Analyze Giving History &gt; Person Giving Summaries &gt; Commitment Register &gt; Commitment Register Filter</b></li> <li>• <b>Contributor Relations &gt; Analyze Giving History &gt; Workset Giving Summaries &gt; Commitment Register - Workset &gt; Commitment Register Filter</b></li> </ul>  | Select criteria used to narrow the number of transactions you view on the Commitment Register page.          |

| <b>Page Name</b>    | <b>Definition Name</b>                              | <b>Navigation</b>  | <b>Usage</b>   |
|---------------------|---|--|--|
| Commitment Register | AV_CMTMT_TRNS_LIST                                  | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Analyze Giving History &gt; Person Giving Summaries &gt; Commitment Register &gt; Commitment Register</b></li> <li>• <b>Contributor Relations &gt; Analyze Giving History &gt; Workset Giving Summaries &gt; Commitment Register - Workset &gt; Commitment Register</b></li> </ul>  | View the transactions that match the criteria you set on the Commitment Register Filter page.        |
| Transaction Filter  | AV_TRANS_FLTR<br>AV_TRANS_FLTR_E<br>AV_TRANS_FLTR_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Analyze Giving History &gt; Person Giving Summaries &gt; Transaction Register &gt; Transaction Filter</b></li> <li>• <b>Contributor Relations &gt; Analyze Giving History &gt; Organization Giving Summaries &gt; Transaction Register - Org &gt; Transaction Filter</b></li> <li>• <b>Contributor Relations &gt; Analyze Giving History &gt; Workset Giving Summaries &gt; Transaction Register - Workset &gt; Transaction Filter</b></li> </ul> | Select criteria used to narrow the number of transactions you view on the Transaction Register page. |

| <b>Page Name</b>     | <b>Definition Name</b>                              | <b>Navigation</b>  | <b>Usage</b>  |
|----------------------|---|--|---|
| Transaction Register | AV_TRANS_LIST<br>AV_TRANS_LIST_E<br>AV_TRANS_LIST_W | <ul style="list-style-type: none"> <li>• <b>Contributor Relations &gt; Analyze Giving History &gt; Person Giving Summaries &gt; Transaction Register &gt; Transaction Register</b></li> <li>• <b>Contributor Relations &gt; Analyze Giving History &gt; Organization Giving Summaries &gt; Transaction Register - Org &gt; Transaction Register</b></li> <li>• <b>Contributor Relations &gt; Analyze Giving History &gt; Workset Giving Summaries &gt; Transaction Register - Workset &gt; Transaction Register</b></li> </ul> | View the transactions that meet the criteria you selected on the Transaction Filter page. |
| Adjust Gift Detail   | AV_ADJ_GIFT_DTL_SP                                  | <ul style="list-style-type: none"> <li>• Select the <b>View Adjustments</b> check box on the Commitment Register Filter or Transaction Filter page.</li> <li>• Click the <b>Details</b> link on the Commitment Register or Transaction Register page for an adjusted gift.</li> </ul>  | View detailed information about an adjusted gift.   |
| Adjust Pledge Detail | AV_ADJ_PLDG_DTL_SP                                  | <ul style="list-style-type: none"> <li>• Select the <b>View Adjustments</b> check box on the Commitment Register Filter or Transaction Filter page.</li> <li>• Click the <b>Details</b> link on the Commitment Register or Transaction Register page for an adjusted pledge.</li> </ul>  | View detailed information about an adjusted pledge.                                       |
| Profile Compare      | AV_GP_WSET_CMPR                                     | <b>Contributor Relations &gt; Analyze Giving History &gt; Workset Giving Summaries &gt; Giving Profile Compare</b>   | Compare the information contained in giving profiles for the constituents in a workset.   |

| <b>Page Name</b>        | <b>Definition Name</b> | <b>Navigation</b>  | <b>Usage</b>   |
|-------------------------|------------------------|--|--|
| Profile Compare Columns | AV_PROF_CMP_DEF_SP     | Click the <b>Profile Compare Columns</b> 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.

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.

Giving Profile

Shawn Gallegher ID: AV0001

Constituent Type: [Alumni](#) Year: [2001](#) PSUNV Prospect Manager: Mario Capozzelli

Lifetime Information

|  |          |
|--|----------|
| <a href="#">Lifetime Commitments</a>   | 0.00 USD |
| <a href="#">Lifetime Open Pledges</a>  | 0.00     |
| <a href="#">Largest Pledge</a>         | 0.00     |
| <a href="#">Lifetime Gifts/Payment</a> | 0.00     |
| <a href="#">Largest Gift</a>           | 0.00     |
| <a href="#">Lifetime Hard Credits</a>  | 0.00     |

Historical Information

|   |      |
|---|------|
| <a href="#">Total YTD Giving</a>        | 0.00 |
| <a href="#">Total Prior Year Giving</a> | 0.00 |
| <a href="#">Last Gift Date</a>          |      |
| <b>Last Gift Amount:</b>                |      |
| <b>First Gift Year:</b>                 |      |
| <b>Total Years Giving:</b>              | 0    |
| <b>Consecutive Years Giving:</b>        | 0    |

Additional Information

- Split Recognition
- Anonymous
- Gift Tribute
- Foundation
- Planned Giving Donor

Matching Gift Information

|                        |      |
|------------------------|------|
| <b>Lifetime Match:</b> | 0.00 |
| <b>Matched Gifts:</b>  | 0.00 |
| <b>Open Matches:</b>   | 0.00 |
| <b>Last Match:</b>     | 0.00 |

[Giving Club Progress](#)

View Details by Designation

## Lifetime Information

| <b>Field or Control</b>       | <b>Description</b>  |
|-------------------------------|---|
| <b>Lifetime Commitments</b>   | <p>Displays the total amount of money ever donated or pledged by the donor.</p> <p>Click to view the date, gift type, credit type, and amount for each commitment made, by business unit, on the Lifetime Commitments page.</p>   |
| <b>Lifetime Open Pledges</b>  | <p>Displays the total amount of money promised but not yet donated by the donor.</p> <p>Click to view the date, gift type, credit type, and amount for each outstanding pledge on the Lifetime Open Pledges page.</p>   |
| <b>Largest Pledge</b>         | <p>Displays the amount of the largest pledge commitment the donor has made.</p> <p>Click to view detailed information about the pledge on the Largest Pledge page, and to access the Designation Detail and Recognition Detail pages.</p>   |
| <b>Lifetime Gifts/Payment</b> | <p>Displays the total amount of money ever donated by the donor. This amount only includes money actually received, and excludes outstanding pledges.</p> <p>Click to view the date, gift type, credit type, and amount for each gift given on the Lifetime Gifts and Pledge Payments page.</p> |
| <b>Largest Gift</b>           | <p>Displays the amount of the largest gift given by the donor.</p> <p>Click to view detailed information about the largest gift on the Largest Gift page, and to access the Designation Detail, Matching Gifts, and Recognition Detail pages.</p>   |
| <b>Lifetime Hard Credits</b>  | <p>Displays the total amount of hard credit given to the donor for recognition purposes.</p> <p>Click to view the date, gift type, credit type, and amount for each transaction for which the donor received hard recognition credit on the Lifetime Hard Credits page.</p>                     |

## Historical Information

| <b>Field or Control</b>         | <b>Description</b>   |
|---------------------------------|--|
| <b>Total YTD Giving</b>         | <p>Displays the total amount of money donated by the constituent during the current fiscal year.</p> <p>Click to view the date, gift type, credit type, and amount for each gift given during the current fiscal year on the Total Year to Date Giving page.</p>   |
| <b>Total Prior Year Giving</b>  | <p>Displays the total amount of money donated by the constituent during the previous fiscal year.</p> <p>Click to view the date, gift type, credit type, and amount for each gift given during the prior fiscal year on the Total Prior Year Giving page.</p>  |
| <b>Last Gift Date</b>           | <p>Displays the date on which the donor's most recent gift was posted in the system. Only hard credit recognition is used to calculate this field.</p> <p>Click to view detailed information about the largest gift on the Last Gift Date page, and to access the Designation Detail and Recognition Detail pages.</p> |
| <b>Last Gift Amount</b>         | <p>Displays the amount of the donor's most recent gift.</p>  |
| <b>First Gift Year</b>          | <p>Displays the year in which the donor first gave to your institution. Only hard credit recognition is used to calculate this field.</p>  |
| <b>Total Years Giving</b>       | <p>Displays the total number of years in which the donor has given to your institution.</p>  |
| <b>Consecutive Years Giving</b> | <p>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.</p>                                      |

## Additional Information

| <b>Field or Control</b>     | <b>Description</b>  |
|-----------------------------|---|
| <b>Split Recognition</b>    | If selected, indicates that recognition has been split between this donor and another donor for the same gift.  |
| <b>Anonymous</b>            | If selected, indicates that the Anonymous check box is selected on the Gift Entry page for a gift from this donor.  |
| <b>Gift Tribute</b>         | If selected, indicates that the donor has made at least one commitment to the institution in honor of or in memory of another person.   |
| <b>Foundation</b>           | If selected, indicates that the donor has a relationship established in the system with a foundation. Foundations must have a constituent type of <i>Corporate Foundation</i> , <i>Foundation</i> , or <i>Personal, Family/Foundation</i> . |
| <b>Planned Giving Donor</b> | If selected, indicates that the donor has made a commitment through a deferred gift tracked in Planned Giving under Prospect Management.  |

## Matching Gift Information

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Lifetime Match</b>   | 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.                           |
| <b>Matched Gifts</b>    | 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. |
| <b>Open Matches</b>     | Displays the total amount of matching gifts expected from an organization as a result of the donor's gifts.  |
| <b>Last Match</b>       | 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

| <i>Field or Control</i>            | <i>Description</i>  |
|------------------------------------|---|
| <b>View Details By Designation</b> | 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. |
| <b>Giving Club Progress</b>        | 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**).

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.

**Giving Profile**

Ford Motor Company **ID:** AV1000

**Constituent Type:**

**Institution:** PSUNV

**Lifetime Information**

|  |          |
|--|----------|
| <a href="#">Lifetime Commitments</a>   | 0.00 USD |
| <a href="#">Lifetime Open Pledges</a>  | 0.00     |
| <a href="#">Largest Pledge</a>         | 0.00     |
| <a href="#">Lifetime Gifts/Payment</a> | 0.00     |
| <a href="#">Largest Gift</a>           | 0.00     |
| <a href="#">Lifetime Hard Credits</a>  | 0.00     |

**Historical Information**

|   |      |
|---|------|
| <a href="#">Total YTD Giving</a>        | 0.00 |
| <a href="#">Total Prior Year Giving</a> | 0.00 |
| <a href="#">Last Gift Date</a>          |      |
| <b>Last Gift Amount:</b>                |      |
| <b>First Gift Year:</b>                 |      |
| <b>Total Years Giving:</b>              | 0    |
| <b>Consecutive Years Giving:</b>        | 0    |

**Additional Information**

- Split Recognition
- Anonymous
- Gift Tribute
- Foundation

**Matching Gift Information**

|                        |      |
|------------------------|------|
| <b>Lifetime Match:</b> | 0.00 |
| <b>Open Matches:</b>   | 0.00 |
| <b>YTD Match:</b>      | 0.00 |
| <b>Prev Yr Match:</b>  | 0.00 |

[Giving Club Progress](#)

**View Details by Designation**

**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

| <i>Field or Control</i>      | <i>Description</i>   |
|------------------------------|--|
| <b>Lifetime Commitments</b>  | <p>Displays the total amount of money ever donated or pledged by the organization.</p> <p>Click to view the date, gift type, credit type, and amount for each commitment made on the Lifetime Commitments page.</p>          |
| <b>Lifetime Open Pledges</b> | <p>Displays the total amount of money promised but not yet donated by the organization.</p> <p>Click to view the date, gift type, credit type, and amount for each outstanding pledge on the Lifetime Open Pledges page.</p> |

| <b><i>Field or Control</i></b> | <b><i>Description</i></b>  |
|--------------------------------|--|
| <b>Largest Pledge</b>          | <p>Displays the amount of the largest pledge commitment the organization has made.</p> <p>Click to view detailed information about the pledge on the Largest Pledge page, and to access the Designation Detail and Recognition Detail pages.</p>   |
| <b>Lifetime Gifts/Payment</b>  | <p>Displays the total amount of money ever donated by the organization. This amount only includes money actually received, and excludes outstanding pledges.</p> <p>Click to view the date, gift type, credit type, and amount for each gift given on the Lifetime Gifts and Pledge Payments page.</p> |
| <b>Largest Gift</b>            | <p>Displays the amount of the largest gift given by the organization.</p> <p>Click to view detailed information about the largest gift on the Largest Gift page, and to access the Designation Detail, Matching Gifts, and Recognition Detail pages.</p>   |
| <b>Lifetime Hard Credits</b>   | <p>Displays the total amount of hard credit given to the organization for recognition purposes.</p> <p>Click to view the date, gift type, credit type, and amount for each transaction for which the donor received hard recognition credit on the Lifetime Hard Credits page.</p>                     |

## Historical Information

| <b><i>Field or Control</i></b> | <b><i>Description</i></b>   |
|--------------------------------|---|
| <b>Total YTD Giving</b>        | <p>Displays the total amount of money donated by the organization during the current fiscal year.</p> <p>Click to view the date, gift type, credit type, and amount for each gift given during the current fiscal year on the Total Year to Date Giving page.</p> |

| <b>Field or Control</b>         | <b>Description</b>  |
|---------------------------------|---|
| <b>Total Prior Year Giving</b>  | <p>Displays the total amount of money donated by the organization during the previous fiscal year.</p> <p>Click to view the date, gift type, credit type, and amount for each gift given during the prior fiscal year on the Total Prior Year Giving page.</p>  |
| <b>Last Gift Date</b>           | <p>Displays the date on which the organization's most recent gift was posted in the system. Only hard credit recognition is used to calculate this field.</p> <p>Click to view detailed information about the largest gift on the Last Gift Date page, and to access the Designation Detail and Recognition Detail pages.</p> |
| <b>Last Gift Amount</b>         | Displays the amount of the organization's most recent gift.   |
| <b>First Gift Year</b>          | Displays the year in which the organization first gave to your institution. Only hard credit recognition is used to calculate this field.   |
| <b>Total Years Giving</b>       | 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.   |
| <b>Consecutive Years Giving</b> | 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

| <b>Field or Control</b>  | <b>Description</b>  |
|--------------------------|---|
| <b>Split Recognition</b> | If selected, indicates that recognition has been split between this organization and another constituent for the same gift. |
| <b>Anonymous</b>         | If selected, indicates that the Anonymous check box is selected on the Gift Entry page for a gift from this organization.   |

| <b><i>Field or Control</i></b> | <b><i>Description</i></b>  |
|--------------------------------|--|
| <b>Gift Tribute</b>            | If selected, indicates that the donor has made a gift in memory of or in honor of another individual.  |
| <b>Foundation</b>              | If selected, indicates that the organization has a relationship established in the system with a foundation. Foundations must have a constituent type of <i>Corporate Foundation</i> , <i>Foundation</i> , or <i>Personal, Family/Foundation</i> . |

## Matching Gift Information

| <b><i>Field or Control</i></b>             | <b><i>Description</i></b>  |
|--|--|
| <b>Lifetime Match</b>                      | 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. |
| <b>Open Matches</b>                        | Displays the total amount of matching gifts expected from an organization as a result of gifts from donors connected to the organization.                            |
| <b>YTD Match</b> (year to date match)      | Displays the total amount of matching gifts received from the beginning of the current year to date.   |
| <b>Prev Yr Match</b> (previous year match) | Displays the total amount of the matching gifts in the previous year.  |

## Other Page Elements

| <b><i>Field or Control</i></b>     | <b><i>Description</i></b>  |
|------------------------------------|--|
| <b>View Details By Designation</b> | 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. |
| <b>Giving Club Progress</b>        | 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**).

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: <a href="#">Friend</a>  |                   | Year: <a href="#">None</a> PSUNV |                | Prospect Manager: NONE |                            |                          |
| Lifetime Commitments  |                   | Lifetime Giving                  |                | Total Years Giving     |                            | Consecutive Years Giving |
| 10,950.00 USD   |                   | 6,050.00                         |                | 2                      |                            | 0                        |
| <a href="#">Customize</a>   <a href="#">Find</a>   <a href="#">View All</a>   <a href="#">First</a>   1-3 of 3   <a href="#">Last</a> |                   |                                  |                |                        |                            |                          |
| 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                   | <a href="#">Details</a>  |
| 2004  | 6,950.00          | 5,050.00                         | 500.00         | 1,400.00               | 0.00                       | <a href="#">Details</a>  |
| 2003  | 1,000.00          | 1,000.00                         | 0.00           | 0.00                   | 0.00                       | <a href="#">Details</a>  |

**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.

| Field or Control            | Description  |
|-----------------------------|--|
| <b>Lifetime Commitments</b> | Displays the total amount of money ever donated or pledged by the donor.   |
| <b>Lifetime Giving</b>      | Displays the total amount of money ever donated by the constituent. This amount only includes money actually received, and excludes outstanding pledges. |
| <b>Total Years Giving</b>   | 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.       |
| <b>Details</b>              | 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.

| <b>Field or Control</b>           | <b>Description</b>   |
|-----------------------------------|--|
| <b>Designation Name</b>           | 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. |
| <b>Total Giving</b>               | Displays the total amount in gifts and pledge payments the donor made to this designation during this fiscal year.   |
| <b>Pledge Balance</b>             | Displays the total amount in outstanding pledges the donor carries to this designation during this fiscal year.  |
| <b>Recognition Credits</b>        | Displays the total amount the donor received in Recognition Credit to this designation during this fiscal year.  |
| <b>Recognition Pledge Balance</b> | Displays the total amount the donor is due to receive in recognition credit from outstanding pledge balances to this designation during this fiscal year.  |
| <b>Details</b>                    | 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.

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**Note:** Each gift appears as a single line item on the Commitment Register page, regardless of the designations to which it is allocated.

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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.

The screenshot shows the 'Commitment Register Filter' page. At the top, there are tabs for 'Commitment Register Filter' and 'Commitment Register'. Below the tabs, the user's name 'Will Beatty' and ID 'AV0500' are displayed. The 'Constituent Type' is set to 'Friend', 'Year' is 'None', and 'Institution' is 'PSUNV'. The 'Business Unit' is 'PSUNV' with a search icon and the text 'PSUNV main BU'. The 'Session Type' is 'Gift' with a dropdown arrow. There is a 'Self Service Session' checkbox which is unchecked, and a yellow 'Search' button. Below these are three filter sections: 'Credit Type' with a dropdown and navigation buttons, 'Date Range' with 'From' and 'To' date pickers, and 'Amount Range' with 'From', 'To', and 'Match' input fields. At the bottom, there are two checkboxes: 'View Adjustments' and 'Group Related Transactions', both of which are unchecked.

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.

| <i>Field or Control</i>           | <i>Description</i>  |
|-----------------------------------|---|
| <b>Business Unit</b>              | Enter the business unit for which to view a commitment register.  |
| <b>View Adjustments</b>           | Select this check box to include adjusted transactions on the Commitment Register page.   |
| <b>Group Related Transactions</b> | 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**).

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.

| Commitment Register Filter  |                          | Commitment Register |            |                    |             |              |  |                                     |                         |
|---|--------------------------|---------------------|------------|--------------------|-------------|--------------|--|-------------------------------------|-------------------------|
| Will Beatty   |                          | ID: AV0500          |            |                    |             |              |  |                                     |                         |
| Constituent Type: <a href="#">Friend</a>  |                          | Year: None          |            | Institution: PSUNV |             |              |  |                                     |                         |
| <a href="#">Customize</a>   <a href="#">Find</a>   <a href="#">View All</a>   <a href="#">First</a>   1-5 of 5   <a href="#">Last</a> |                          |                     |            |                    |             |              |  |                                     |                         |
|   | Anonymous                | Business Unit       | Date       | Transaction Type   | Credit Type | Amount       |  | Tribute                             | Details                 |
| 1   | <input type="checkbox"/> | PSUNV               | 09/28/2004 | Gift               | Hard Credit | 50.00 USD    |  | <input type="checkbox"/>            | <a href="#">Details</a> |
| 2   | <input type="checkbox"/> | PSUNV               | 09/28/2004 | Gift               | Soft Credit | 400.00 USD   |  | <input type="checkbox"/>            | <a href="#">Details</a> |
| 3   | <input type="checkbox"/> | PSUNV               | 09/28/2004 | Gift               | Hard Credit | 5,000.00 USD |  | <input checked="" type="checkbox"/> | <a href="#">Details</a> |
| 4   | <input type="checkbox"/> | PSUNV               | 09/28/2004 | Gift               | Soft Credit | 1,000.00 USD |  | <input type="checkbox"/>            | <a href="#">Details</a> |
| 5   | <input type="checkbox"/> | PSUNV               | 09/13/2003 | Gift               | Hard Credit | 1,000.00 USD |  | <input type="checkbox"/>            | <a href="#">Details</a> |

| Field or Control | Description  |
|------------------|--|
| <b>Anonymous</b> | If selected, this check box indicates that the donor's part of a particular gift or pledge has been designated as <i>Anonymous</i> . |
| <b>Tribute</b>   | If selected, this check box indicates that a particular gift or pledge has related tribute information.                              |
| <b>Details</b>   | 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.

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.

The screenshot shows the 'Transaction Filter' page with the following fields and controls:

- Constituent:** Will Beatty, ID: AV0500
- Constituent Type:** Friend
- Year:** None
- Institution:** PSUNV
- Business Unit:** PSUNV (selected), PSUNV main BU
- Designation:** (empty)
- Session Type:** (dropdown menu)
- Self Service Session:**
- Campaign:** CAMPPSUNV (selected), Campaign PSUNV
- Credit Type:** (dropdown menu), Find | View All | First | 1 of 1 | Last
- Date Range:** From: (calendar), To: (calendar)
- Amount Range:** From: (input), To: (input), USD, Match: (input)
- View Adjustments:**
- Group Related Transactions:**
- Search:** Search button

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.

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Business Unit</b>    | Enter the designation business unit for which to view transactions. Designation business units are assigned when you allocate transactions to designations at your institution.  |
| <b>Designation</b>      | 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.<br><br>If a donor made a commitment to a designation that is now inactive, the designation still appears as a value in the prompt box. |
| <b>Campaign</b>         | 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.   |
| <b>View Adjustments</b> | Select this check box to include adjusted transactions on the Transaction Register page.   |

| <b>Field or Control</b>           | <b>Description</b>   |
|-----------------------------------|--|
| <b>Group Related Transactions</b> | 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**).

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                | Des BU | Date       | Designation Name            | Campaign       | Transaction Type | Credit Type | Amount       | Tribute                  | Details                 |
|--------------------------|--------|------------|-----------------------------|----------------|------------------|-------------|--------------|--------------------------|-------------------------|
| <input type="checkbox"/> | PSUNV  | 09/28/2004 | Business Dean's Fund        | Campaign PSUNV | Gift             | Hard Credit | 50.00 USD    | <input type="checkbox"/> | <a href="#">Details</a> |
| <input type="checkbox"/> | PSUNV  | 09/28/2004 | Business Dean's Fund        | Campaign PSUNV | Pledge           | Hard Credit | 500.00 USD   | <input type="checkbox"/> | <a href="#">Details</a> |
| <input type="checkbox"/> | PSUNV  | 09/28/2004 | Business Dean's Fund        | Campaign PSUNV | Pledge           | Soft Credit | 500.00 USD   | <input type="checkbox"/> | <a href="#">Details</a> |
| <input type="checkbox"/> | PSUNV  | 09/13/2003 | Arts & Sciences Dean's Fund | Campaign PSUNV | Gift             | Hard Credit | 1,000.00 USD | <input type="checkbox"/> | <a href="#">Details</a> |

| <b>Field or Control</b>                   | <b>Description</b>   |
|---|--|
| <b>Anonymous</b>                          | If selected, this check box indicates that the donor's part of a particular gift or pledge has been designated as <i>Anonymous</i> . |
| <b>Des BU</b> (designation business unit) | Displays the name of the designation business unit to which the commitment was allocated.  |
| <b>Tribute</b>                            | If selected, this check box indicates that a particular gift or pledge has related tribute information.                              |
| <b>Details</b>                            | 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**).

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.

**Profile Compare**

**Workset Code:** MYPROS My Prospects      **Institution:** PSUNV

**From Date:**  **To Date:**    **Currency Code:** USD

---

Customize | Find | View All | First 1-3 of 3 Last

**Giving Detail 1** | Giving Detail 2

| ID       | Constituent           | LTime Commitments | LTime Gifts/Payments | LTime Open Pledges | LTime Hard Credits | Total YTD Giving |
|----------|-----------------------|-------------------|----------------------|--------------------|--------------------|------------------|
| 1 AV1010 | Bechtel Power Company | 0.00              | 0.00                 | 0.00               | 0.00               | 0.00             |
| 2 AV0029 | Northmar,Brighton     | 330.00            | 110.00               | 220.00             | 110.00             | 110.00           |
| 3 AV0050 | Ratcliffe,Stephen     | 2,060.00          | 1,860.00             | 200.00             | 1,860.00           | 1,760.00         |

**Note:** This page can only be accessed through the Workset menu. Column order for grids may vary by implementation. Not all columns may appear.

| <i>Field or Control</i>        | <i>Description</i>  |
|--------------------------------|---|
| <b>Profile Compare Columns</b> | <p>Click to change the columns you view on this page in this instance. The Select Profile Compare Columns page appears.</p> <p>Select the check box next to each field to display it as a column on the Profile Compare page, then click the <b>OK</b> button. The Profile Compare page reappears with the column settings you selected.</p> <hr/> <p><b>Note:</b> These fields are defined on the Giving Profile page.</p> |
|                                | Click to combine the Giving Detail 1 and Giving Detail 2 tabs into a single viewable grid.  |

**Related Links**

"Defining Contributor Relations User Defaults" (Campus Solutions 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

| <i>Page Name</i>       | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|------------------------|------------------------|--|--|
| Designation Donor List | AV_RUNCTL_DESDN        | <b>Contributor Relations &gt; CR Reports &gt; Giving Reports &gt; Designation Donor List</b> | 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**).

| <i>Field or Control</i>                           | <i>Description</i>   |
|---|--|
| <b>Designation BU</b> (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.   |
| <b>Designation</b>                                | 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.<br><br>Both active and inactive designations appear in the prompt for this field. |
| <b>From and To</b>                                | <b>Note:</b> 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.  |
| <b>From Gift Amount and To Gift Amount</b>        | <b>Note:</b> 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.   |

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Constituents</b>     | <p>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 <i>Alumni</i>, <i>Friend</i>, <i>Corporation</i>, and so on.</p> <p>If you do not select constituent types, the system does not eliminate any records from the designation donor list report based on constituent type.</p> <hr/> <p><b>Important!</b> 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.</p> <hr/> <p>Keep in mind, an organization can only be assigned one constituent type at any given time.</p> <p>See <a href="#">Defining Constituent Types</a>.</p> |
| <b>Credit Type</b>      | <p>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 <i>Hard Credit</i>, <i>Soft Credit</i>, and so on. Credit types are defined by your institution using the Recognition Types page.</p> <p>If you do not select credit types, the system does not eliminate any records from the designation donor list report based on credit type.</p>   |

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.

| <b>Gift Amount</b> | <b>Gift Date</b> | <b>Constituent Type</b> | <b>Credit Type</b> |
|--------------------|------------------|-------------------------|--------------------|
| 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](#)



# 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

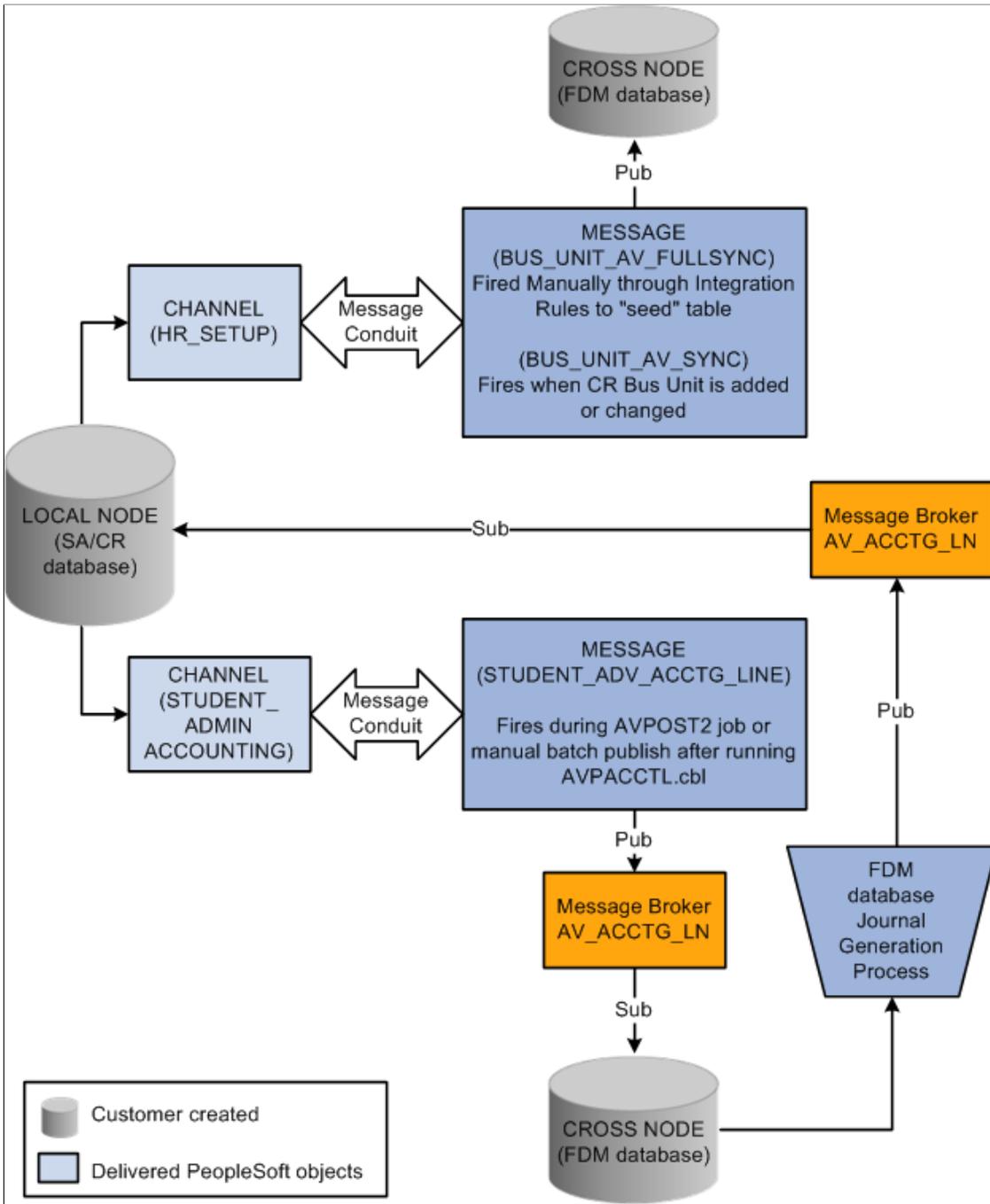
[Processing and Posting Sessions](#)

---

## Understanding Messaging

The diagram below illustrates how messages travel between Contributor Relations and Financials 8.4 or 8.8.

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:

| <b>Queues</b>            | <b>Message</b>         | <b>Description</b>  |
|--------------------------|------------------------|---|
| 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

| <i>Page Name</i>                                     | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>  |
|--|------------------------|--|---|
| CR Installation (Contributor Relations installation) | AV_INSTALLATION        | <b>Set Up SACR &gt; Install &gt; Contributor Rel Installation</b>  | Identify the version of financial software in use at your institution, whether from PeopleSoft or a third-party vendor.                             |
| Batch Publish Rules                                  | EO_MSGPUBATCH          | <b>Enterprise Components &gt; Integration Definitions &gt; Batch Publish Rules</b>                       | Define rules required for background publishing, whether publishing manually or by running the EOP_PUBLISH process that is part of the AVPOST2 job. |
| Batch Programs                                       | EO_MSGBATPGM           | <b>Enterprise Components &gt; Integration Definitions &gt; Batch Publish Rules &gt; Batch Programs</b>   | Define the process that the manual or automatic process accesses (AVPACCTL).  |
| Full Table Publish Rules                             | EO_MSGPUBFULL          | <b>Enterprise Components &gt; Integration Definitions &gt; Full Data Publish Rules</b>                   | Define publish rules that enable messaging.   |
| Full Data Publish                                    | EO_FULLDATAPUB         | <b>Enterprise Components &gt; Integration Definitions &gt; Initiate Processes &gt; Full Data Publish</b> | 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.

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.

**Batch Publish Rules** | Record Mapping | Batch Programs

**Message Name:** STUDENT\_ADV\_ACCTG\_LINE

**Description:** AV\_ACCTG\_LN Message

**Publish Rule Definition** Find | View All First 1 of 1 Last

**\*Publish Rule ID:** STUDENT\_ADV\_ACCTG\_LINE

**\*Description:** AV\_ACCTG\_LN Message Batch Rule

**\*Status:** Active

**Chunking Rule ID:**

**Alternate Chunk**

**Table:**

| Message Options  | Output Format                                       |
|--|---|
| <input checked="" type="checkbox"/> Create Message Header  | <input checked="" type="radio"/> Message            |
| <input checked="" type="checkbox"/> Create Message Trailer | <input type="radio"/> Flat File                     |
|  | <input type="radio"/> Flat File with Control Record |

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**).

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.

---

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.

| <i>Field or Control</i> | <i>Description</i>  |
|-------------------------|---|
| <b>Publish Rule ID</b>  | Enter <i>BUS_UNIT_AV_FULLSYNC</i> . This rule publishes three fields (Business Unit, Description, Short Description) for all rows on the table to Financials. |
| <b>Status</b>           | You must set this to <i>Active</i> .  |
| <b>Message Options</b>  | You must select the check boxes next to <b>Create Message Header</b> and <b>Create Message Trailer</b> .  |

## 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.

- 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

| <i>Page Name</i>                        | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>  |
|---|------------------------|---|---|
| GL Interface (general ledger interface) | AV_RUN_CNTL_GL         | <b>Contributor Relations &gt; Session Management &gt; Process Sessions &gt; G/L Interface</b> | 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.

- Run the CR/GL Post process (AVPACCTL) only.

---

**Note:** Do not run the AVPOST2 job.

---

- Access the Batch Publish page.
- 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

| <i>Page Name</i>                        | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|---|------------------------|--|--|
| GL Interface (general ledger interface) | AV_RUN_CNTL_GL         | <b>Contributor Relations &gt; Session Management &gt; Process Sessions &gt; G/L Interface</b>        | 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            | <b>Enterprise Components &gt; Integration Definitions &gt; Initiate Processes &gt; Batch Publish</b> | 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.

| <b>Field or Control</b>           | <b>Description</b>                    |
|-----------------------------------|---------------------------------------|
| <b>Request ID and Description</b> | Enter an ID and describe the process. |
| <b>Process Frequency</b>          | Select <i>Once</i> .                  |
| <b>Process Name</b>               | Enter <i>AVPACCTL</i> .               |

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.

# Working with Self-Service Involvement

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## 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" (Campus Self Service )

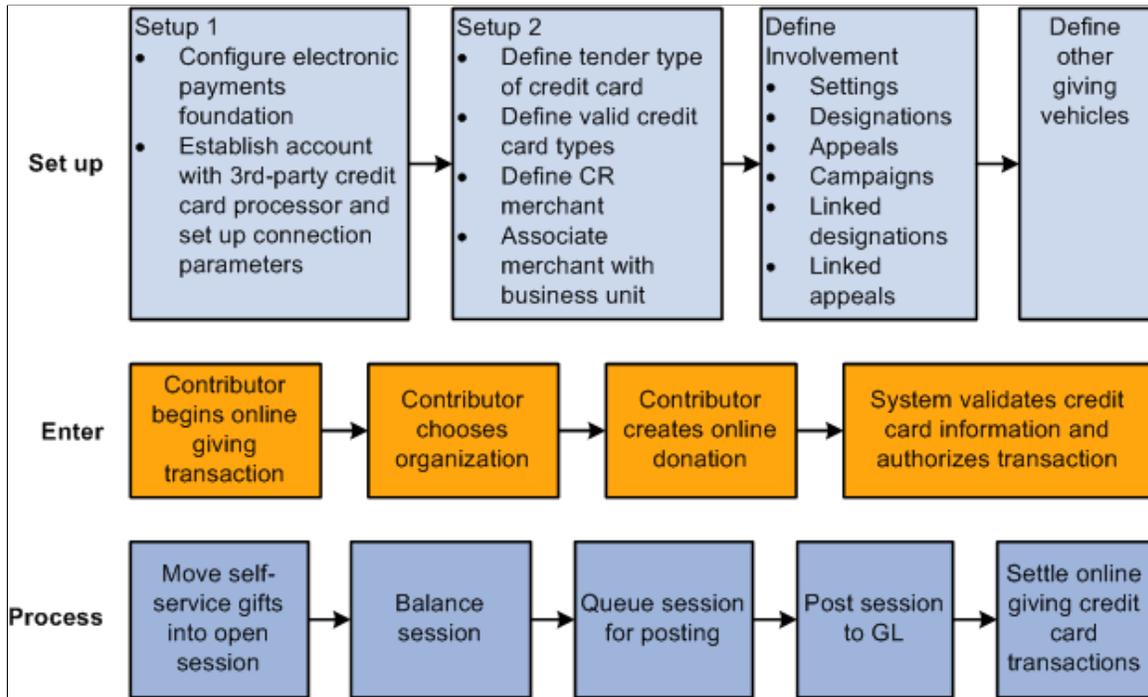
Virtually all fund-raising organizations have established, or are in the process of establishing, a web presence that provides self-service facilities to their contributors. These organizations need the ability to accept and process credit card payments online when receiving a donation. Using Involvement's 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:

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).

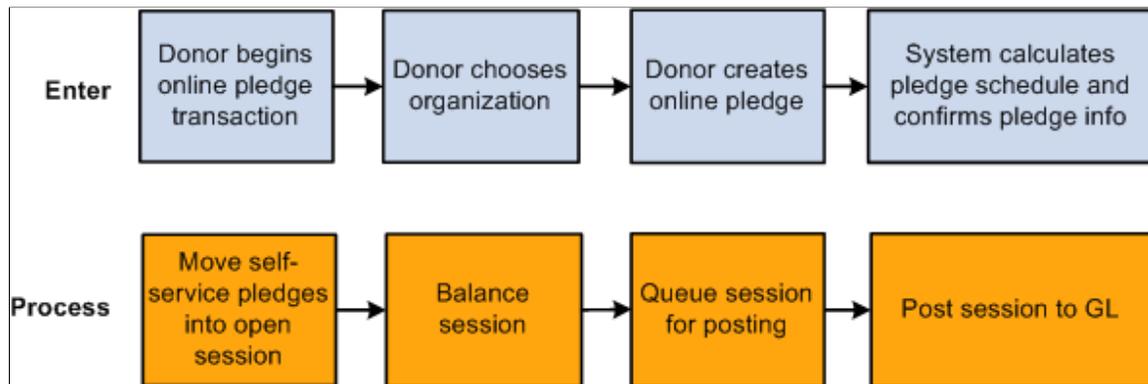
**Related Links**

[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:

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

| <i>Page Name</i>                      | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>  |
|---------------------------------------|------------------------|--|---|
| Donations - Choose Organization       | AV_INVLV_G_INST        | <b>Self Service</b> ><br><b>Involvement</b> > <b>Ways to Give</b><br><br>Click an organization name link.  | Donors select an organization to receive their donation.  |
| Ways to Give                          | AV_INVLV_G_WAYS        | <ul style="list-style-type: none"> <li>• <b>Self Service</b> &gt;<br/><b>Involvement</b> &gt; <b>Ways to Give</b></li> <li>• Click a link under the Description heading on the Donations - Ways to Give page.</li> </ul> | 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 <b>Make your gift securely on-line</b> 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 <b>Next</b> 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 <b>Next</b> 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 <b>Next</b> 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 <b>View Fund Information</b> 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 <b>Submit</b> 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 <b>Invest in existing campaigns</b> link on the Ways to Give page.   | Donors select a campaign to receive their donation.   |

| <b>Page Name</b>      | <b>Definition Name</b> | <b>Navigation</b>   | <b>Usage</b>   |
|-----------------------|------------------------|---|--|
| Mail In Donation Form | AV_INVLV_G_FORM        | Click the <b>Mail-in donation form</b> 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.

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**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.

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**Note:** The **Mail To** name and address information at the top of the page is defined on the Involvement Setup page.

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## 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

| <i>Page Name</i>                      | <i>Definition Name</i> | <i>Navigation</i>  | <i>Usage</i>   |
|---------------------------------------|------------------------|--|--|
| Donations - Ways to Give              | AV_INVLV_G_WAYS        | <b>Self Service</b> ><br><b>Involvement</b> > <b>Ways to Give</b>  | Donors review donation options set up by the institution.  |
| Donations - Campaigns                 | AV_INVLV_G_CMPGN       | Click the <b>Invest in existing campaigns</b> link on the Donations - Ways to Give page.   | Donors view existing campaigns and select a campaign to receive the gift or pledge.              |
| Make a Donation - Welcome             | AV_INVLV_G_INTRO       | <ul style="list-style-type: none"> <li>Click the <b>Make a pledge online</b> link on the Donations - Ways to Give page.</li> <li>Click the <b>Pledge to this campaign</b> link next to a campaign name on the Donations - Campaigns page.</li> </ul> | 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 <b>Next</b> 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 <b>Next</b> 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 <b>Next</b> 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 <b>View Fund Information</b> 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 <b>Submit</b> button on the Make a Donation - Confirm and Submit page.   | Donors see the Payment Result page when their online pledge is created.                          |

| <b>Page Name</b>      | <b>Definition Name</b> | <b>Navigation</b>  | <b>Usage</b>  |
|-----------------------|------------------------|--|---|
| Mail-in Donation Form | AV_INVLV_G_FORM        | Click the <b>Mail-in Donation Form</b> 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.

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## Monitoring Self-Service Commitment Summary

This section discusses how to view a commitment summary.

## Pages Used to Monitor Self-Service Commitment Summary

| <i>Page Name</i>    | <i>Definition Name</i>               | <i>Navigation</i>   | <i>Usage</i>  |
|---------------------|--------------------------------------|---|---|
| Commitment Summary  | AV_SS_P_CS_ORG<br>AV_SS_P_CMTMT_SMRY | <b>Self Service</b> ><br><b>Involvement</b> ><br><b>My Involvement</b> ><br><b>Commitment Summary</b> | Donors view information about their history of giving to the institution. |
| Fiscal Year Details | AV_SS_CS_SP                          | Click the <b>Fiscal Year</b> 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.

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## 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

| <i>Page Name</i>     | <i>Definition Name</i>          | <i>Navigation</i>   | <i>Usage</i>  |
|----------------------|---------------------------------|---|---|
| Giving Club Progress | AV_SS_P_GC_ORG<br>AV_SS_P_GCLUB | <b>Self Service</b> ><br><b>Involvement</b> > <b>My Involvement</b> > <b>Giving Club Progress</b> | 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

| <i>Page Name</i>   | <i>Definition Name</i>            | <i>Navigation</i>   | <i>Usage</i>  |
|--------------------|-----------------------------------|---|---|
| Membership History | AV_SS_P_MB_ORG<br>AV_SS_P_MBR_INQ | <b>Self Service</b> ><br><b>Involvement</b> > <b>My Involvement</b> > <b>My Memberships</b> | 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

| <i>Page Name</i>    | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|---------------------|------------------------|---|--|
| Self Service Giving | AV_RUNCTL_INVLV        | <b>Contributor Relations</b> ><br><b>Session Management</b> ><br><b>Process Sessions</b> > <b>Process Self Service Giving</b> | 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.

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**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.

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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.

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## 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](#)

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## 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.

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- *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

| <b>Page Name</b>                             | <b>Definition Name</b> | <b>Navigation</b>  | <b>Usage</b>  |
|--|------------------------|--|---|
| EP Transaction Processing - Filter Options   | AV_EP_FLTR             | <b>Contributor Relations</b> > <b>Session Management</b> > <b>Process Electronic Payments</b> > <b>EP Transaction Processing</b> | Enter your selection criteria for the gifts to process.   |
| EP Transaction Processing - Transaction List | AV_EP_G_PROC           | Click the <b>Search</b> 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**).

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.

### EP Transaction Processing

## Filter Options

\*Institution:  PeopleSoft University

\*Business Unit:  Medical Business Unit

Tender Type:  Credit Card

Transaction Requested:

#### Item

|   |  |   |
|---|--|---|
| <div style="border: 1px solid black; padding: 2px;"> <p style="margin: 0;"><b>Self Service Session</b></p> <p><input checked="" type="radio"/> All Sessions</p> <p><input type="radio"/> Only Self Service</p> <p><input type="radio"/> Non Self Service</p> </div> | <div style="border: 1px solid black; padding: 2px;"> <p style="margin: 0;"><b>Post Date</b></p> <p>From <input type="text" value="01/19/2009"/> </p> <p>To <input type="text" value="01/19/2010"/> </p> </div> | <p>Session Number: <input type="text"/> </p> <p>Gift: <input type="text"/> </p> |
|---|--|---|

| <i>Field or Control</i>      | <i>Description</i>   |
|------------------------------|--|
| <b>Institution</b>           | Enter an institution code.   |
| <b>Business Unit</b>         | Enter a business unit for the gift transactions to process. If you leave the business unit blank, you view all gifts for the organization.<br><br><hr/> <b>Note:</b> You must specify a business unit here to use the rest of the filter choices on this page.   |
| <b>Tender Type</b>           | Enter the electronic processing tender type for the gift transactions to be processed (the system populates this field to the electronic payment type <i>Credit Card</i> by default).<br><br><hr/> <b>Note:</b> The PeopleSoft system uses <i>CC</i> to designate this electronic payment tender type. However, you can define it in another way on the Tender Types page. |
| <b>Transaction Requested</b> | Select <i>Capture</i> to capture the self-service gift transactions. Other delivered values for transaction processes currently supported by CyberSource are: <i>Authorize</i> , <i>Authorize and Capture</i> , and <i>Credit</i> .<br><br><hr/> <b>Note:</b> <i>Authorize and Capture</i> is not a valid process for self-service gifts.                                  |
| <b>Self Service Session</b>  | Select <i>Only Self Service</i> to select gifts made through the self-service Make a Donation pages only. Other delivered values include <i>All Sessions</i> and <i>Non Self Service</i> .   |

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Post Date</b>        | Enter dates to select gifts posted within the range of From and To date values.  |
| <b>Session Number</b>   | Enter a session number to select gifts made in this specific session only. To display a session, you must enter a business unit. |
| <b>Gift</b>             | 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).

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**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.**

| <b>Field or Control</b>                 | <b>Description</b>   |
|---|--|
| <b>Select</b>                           | Select the check box for each row to process.  |
| <b>Select All</b>                       | Click this button to select check boxes for all rows.  |
| <b>Payment Status</b>                   | 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 <b>Payment Status</b> value of <i>Authorized</i> . |
| <b>Auth Dt</b> (authorization date)     | After the transaction is authorized, the system populates this field.  |
| <b>Reference Nbr</b> (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.  |
| <b>ID</b>                               | Displays the ID of the contributor.  |
| <b>Gift Amt</b> (gift amount)           | Displays the amount of the gift credit card transaction.   |

| <b>Field or Control</b>   | <b>Description</b>   |
|---------------------------|--|
| <b>Process</b>            | Click to run the capture process. The system gathers the transactions you select and sends them to the third-party credit card payment processor.<br><br><b>Important!</b> After you click the <b>Process</b> button, give the process at least 30 seconds to run. |
| <b>Process Monitor</b>    | Click to review the status of the capture process.   |
| <b>Set Filter Options</b> | 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

| <b>Page Name</b>                        | <b>Definition Name</b> | <b>Navigation</b>   | <b>Usage</b>  |
|---|------------------------|---|---|
| EP Denied Transactions - Filter Options | AV_EP_FLTR             | <b>Contributor Relations</b> ><br><b>Session Management</b> ><br><b>Process Electronic Payments</b> > <b>EP Denied Transactions</b> | Enter your selection criteria for the gift transactions to process. |

| <b>Page Name</b>                          | <b>Definition Name</b> | <b>Navigation</b>  | <b>Usage</b>  |
|---|------------------------|--|---|
| EP Denied Transactions - Transaction List | AV_EP_G_PROC           | Click the <b>Search</b> 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**).

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).

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**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.

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**Important!** After you click the **Process**, **Manual**, or **Cancel Pmt** buttons, give each process at least 30 seconds to run.

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### Related Links

[Capturing Gift and Membership Transactions](#)

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## 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](#)

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## 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 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

| <i>Page Name</i>   | <i>Definition Name</i> | <i>Navigation</i>   | <i>Usage</i>   |
|--|------------------------|---|--|
| Self Service Giving Inquiry - Filter Options               | AV_INV_G_INQ_FLTR      | <b>Contributor Relations</b> ><br><b>Session Management</b> ><br><b>Supervise Sessions</b> > <b>Self Service Giving Summary</b>         | Enter search criteria for self-service gifts or pledges.   |
| Self Service Giving Inquiry - Self Service Giving List     | AV_INVLV_G_INQ         | Click the <b>Search</b> 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 <b>Receipt Number</b> 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         | <b>Contributor Relations</b> ><br><b>Session Management</b> ><br><b>Process Electronic Payments</b> > <b>EP Transaction Log Inquiry</b> | Enter your selection criteria for the self-service gift transactions to review.                                    |
| EP Transaction Log Inquiry - Transaction List              | AV_EP_TRANS_LOG        | Click the <b>Search</b> 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**).

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*.

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**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:

| <b>Payment Status</b> | <b>Description</b>   |
|-----------------------|--|
| 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 <b>Submit</b> 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). |

| <b>Payment Status</b> | <b>Description</b>  |
|-----------------------|---|
| 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.

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

| <i>Field or Control</i>                 | <i>Description</i>  |
|---|---|
| <b>Reference Nbr</b> (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. |
| <b>SeqNum</b> (sequence number)         | Indicates how many actions the system has taken on a particular reference number.   |
| <b>Payment Status</b>                   | Indicates the results of each system action.  |
| <b>Credit Card Message 1</b>            | 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.

| <i>Field or Control</i>   | <i>Description</i>  |
|---|---|
|  | Displays a single page that contains the combined information from both the List and Detail tabs. |
|  | Returns to the EP Transaction Log Inquiry - Transaction List page.                                |

## Chapter 22

# AV\_GP\_LOAD\_TBL Data Fields

## Data Field Details

Use the values in the following table to create your custom API.

| <i>Line Nbr</i> | <i>Column Name</i> | <i>Type</i>    | <i>MSSQL Length</i> | <i>Precision</i>    | <i>Scale</i>        | <i>Comments</i>   | <i>Gift Session Sample Data</i> | <i>Pledge Session Sample Data</i> |
|-----------------|--------------------|----------------|---------------------|---------------------|---------------------|---|---------------------------------|-----------------------------------|
| 1               | BUSINESS_UNIT      | Char<br>KEY    | 5                   | Not Applicable (NA) | Not Applicable (NA) | This is the business unit for the session.  | PSUNV                           | PSUNV                             |
| 2               | SEQ_NBR            | decimal<br>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<br>KEY    | 2                   | NA                  | NA                  | <p>The type of session to be created. Valid values are:</p> <p>G = Gift session</p> <p>PL = Pledge session.</p> <hr/> <p><b>Note:</b> 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.</p> <hr/> | G                               | PL                                |

| <b>Line Nbr</b> | <b>Column Name</b> | <b>Type</b> | <b>MSSQL Length</b> | <b>Precision</b> | <b>Scale</b> | <b>Comments</b>  | <b>Gift Session Sample Data</b> | <b>Pledge Session Sample Data</b> |
|-----------------|--------------------|-------------|---------------------|------------------|--------------|--|---------------------------------|-----------------------------------|
| 4               | EMPLID             | char        | 11                  | NA               | NA           | The ID number of the person who is making the gift or pledge.<br><br><b>Note:</b> If this field is entered, the EXT_ORG_ID field (Line 5) must be blank.   | AV0027                          | Leave blank                       |
| 5               | EXT_ORG_ID         | char        | 11                  | NA               | NA           | The ID number of the organization who is making the gift or pledge.<br><br><b>Note:</b> 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                        |

| <b>Line Nbr</b>   | <b>Column Name</b> | <b>Type</b> | <b>MSSQL Length</b> | <b>Precision</b> | <b>Scale</b> | <b>Comments</b>  | <b>Gift Session Sample Data</b> | <b>Pledge Session Sample Data</b> |
|---|--------------------|-------------|---------------------|------------------|--------------|--|---------------------------------|-----------------------------------|
| 11  | TENDER_TYPE        | char        | 6                   | NA               | NA           | <p>The payment method for the gift. Must be a valid value from the AV_TENDER_TBL.</p> <hr/> <p><b>Note:</b> 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).</p> | CHK                             | <i>Leave blank</i>                |
| 12  | CURRENCY_CD        | char        | 3                   | NA               | NA           | <p>The type of money being used to pay the gift, for example U.S. Dollars or Euros.</p> <hr/> <p><b>Note:</b> Pledges are always entered in the base currency of the institution.</p>  | USD                             | <i>Leave blank</i>                |
| 13  | CHECK_NO           | char        | 10                  | NA               | NA           | <p>For Gift Session (AV_SESS_TYPE = 'G'), the number of the donor's check if the tender is a check.</p> <hr/> <p><b>Note:</b> If a check number is entered, the credit card fields (Lines 14-17) must be blank since a gift has only one tender type.</p>  | <i>Leave blank</i>              | <i>Leave blank</i>                |
| <p><b>Important!</b> The following four fields are inactive. DO NOT USE as they are replaced with new Active Fields for credit card referenced below.</p> |                    |             |                     |                  |              |  |                                 |                                   |

| <b>Line Nbr</b> | <b>Column Name</b>                              | <b>Type</b> | <b>MSSQL Length</b> | <b>Precision</b> | <b>Scale</b> | <b>Comments</b>   | <b>Gift Session Sample Data</b> | <b>Pledge Session Sample Data</b> |
|-----------------|---|-------------|---------------------|------------------|--------------|---|---------------------------------|-----------------------------------|
| 14              | CREDIT_CARD_NO<br><br><i>Inactive field</i>     | char        | 20                  | NA               | NA           | Do not use.<br><br><b>Note:</b> 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<br><br><i>Inactive field</i> | char        | 30                  | NA               | NA           | Do not use.<br><br><b>Note:</b> 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                        |
| 16              | CREDIT_CARD_TYPE<br><br><i>Inactive field</i>   | char        | 2                   | NA               | NA           | Do not use.<br><br><b>Note:</b> 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<br><br><i>Inactive field</i> | PSDATE      | 8                   | NA               | NA           | Do not use.<br><br><b>Note:</b> 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                              | <i>Leave blank</i>                |

| <b>Line Nbr</b> | <b>Column Name</b> | <b>Type</b> | <b>MSSQL Length</b> | <b>Precision</b> | <b>Scale</b> | <b>Comments</b>  | <b>Gift Session Sample Data</b> | <b>Pledge Session Sample Data</b> |
|-----------------|--------------------|-------------|---------------------|------------------|--------------|--|---------------------------------|-----------------------------------|
| 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                                |
| 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                                 |

| <i>Line Nbr</i> | <i>Column Name</i> | <i>Type</i> | <i>MSSQL Length</i> | <i>Precision</i> | <i>Scale</i> | <i>Comments</i>  | <i>Gift Session Sample Data</i> | <i>Pledge Session Sample Data</i> |
|-----------------|--------------------|-------------|---------------------|------------------|--------------|--|---------------------------------|-----------------------------------|
| 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                                |
| 30              | RCG_EMPLID1        | char        | 11                  | NA               | NA           | <p>The following four fields identify up to four persons who are to receive credit for the gift or pledge.</p> <p>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).</p> <hr/> <p><b>Note:</b> 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.</p> <hr/> | 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                                |

| <b>Line Nbr</b> | <b>Column Name</b> | <b>Type</b> | <b>MSSQL Length</b> | <b>Precision</b> | <b>Scale</b> | <b>Comments</b>  | <b>Gift Session Sample Data</b> | <b>Pledge Session Sample Data</b> |
|-----------------|--------------------|-------------|---------------------|------------------|--------------|--|---------------------------------|-----------------------------------|
| 34              | RCG_EXT_ORG_ID1    | char        | 11                  | NA               | NA           | <p>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).</p> <hr/> <p><b>Note:</b> 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.</p> <hr/> | 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           | <p>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).</p>   | H                               | H                                 |

| <b>Line Nbr</b> | <b>Column Name</b> | <b>Type</b> | <b>MSSQL Length</b> | <b>Precision</b> | <b>Scale</b> | <b>Comments</b>   | <b>Gift Session Sample Data</b> | <b>Pledge Session Sample Data</b> |
|-----------------|--------------------|-------------|---------------------|------------------|--------------|---|---------------------------------|-----------------------------------|
| 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                                |

| <b>Line Nbr</b> | <b>Column Name</b> | <b>Type</b> | <b>MSSQL Length</b> | <b>Precision</b> | <b>Scale</b> | <b>Comments</b>  | <b>Gift Session Sample Data</b> | <b>Pledge Session Sample Data</b> |
|-----------------|--------------------|-------------|---------------------|------------------|--------------|--|---------------------------------|-----------------------------------|
| 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                                |

| <b>Line Nbr</b> | <b>Column Name</b> | <b>Type</b> | <b>MSSQL Length</b> | <b>Precision</b> | <b>Scale</b> | <b>Comments</b>   | <b>Gift Session Sample Data</b> | <b>Pledge Session Sample Data</b> |
|-----------------|--------------------|-------------|---------------------|------------------|--------------|---|---------------------------------|-----------------------------------|
| 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                                |
| 50              | DESIGNATION1       | 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.<br><br><b>Note:</b> 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              | DESIGNATION2       | char        | 11                  | NA               | NA           | LIBRARY   | NA                              | NA                                |
| 52              | DESIGNATION3       | char        | 11                  | NA               | NA           | NA  | NA                              | NA                                |
| 53              | DESIGNATION4       | 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                                |

| <b>Line Nbr</b> | <b>Column Name</b> | <b>Type</b> | <b>MSSQL Length</b> | <b>Precision</b> | <b>Scale</b> | <b>Comments</b>  | <b>Gift Session Sample Data</b> | <b>Pledge Session Sample Data</b> |
|-----------------|--------------------|-------------|---------------------|------------------|--------------|--|---------------------------------|-----------------------------------|
| 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                                |
| 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)<br>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                                |

| <b>Line Nbr</b> | <b>Column Name</b> | <b>Type</b> | <b>MSSQL Length</b> | <b>Precision</b> | <b>Scale</b> | <b>Comments</b>  | <b>Gift Session Sample Data</b> | <b>Pledge Session Sample Data</b> |
|-----------------|--------------------|-------------|---------------------|------------------|--------------|--|---------------------------------|-----------------------------------|
| 66              | MOTIVATION_CD1     | nchar       | 9                   | NA               | NA           | <p>The appeal that generated the gift or pledge given to DESIGNATION1 (Line 49).</p> <hr/> <p><b>Note:</b> 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).</p> | MEDICINE                        | MEDICINE                          |
| 67              | MOTIVATION_CD2     | nchar       | 9                   | NA               | NA           | <p>The appeal that generated the gift or pledge given to DESIGNATION2 (Line 50).</p> <hr/> <p><b>Note:</b> 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).</p> | LIBRARY                         | NA                                |
| 68              | MOTIVATION_CD3     | nchar       | 9                   | NA               | NA           | <p>The appeal that generated the gift or pledge given to DESIGNATION3 (Line 51).</p> <hr/> <p><b>Note:</b> 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).</p> | NA                              | NA                                |

| <b>Line Nbr</b> | <b>Column Name</b> | <b>Type</b> | <b>MSSQL Length</b> | <b>Precision</b> | <b>Scale</b> | <b>Comments</b>  | <b>Gift Session Sample Data</b> | <b>Pledge Session Sample Data</b> |
|-----------------|--------------------|-------------|---------------------|------------------|--------------|--|---------------------------------|-----------------------------------|
| 69              | MOTIVATION_CD4     | char        | 9                   | NA               | NA           | The appeal that generated the gift or pledge given to DESIGNATION4 (Line 52).<br><br><b>Note:</b> 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                                |
| 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           | <i>PROCESS GENERATED – Do not enter any values.</i><br>Suspense Reason created by AVPGPLOA.  | <i>Leave blank</i>              | NA                                |
| 75              | COMPLETE_FLAG      | char        | 1                   | NA               | NA           | <i>PROCESS GENERATED – Do not enter any values.</i><br>Indicates if session has been processed by AVPGPLOA.  | <i>Leave blank</i>              | NA                                |

| <b>Line Nbr</b> | <b>Column Name</b> | <b>Type</b> | <b>MSSQL Length</b> | <b>Precision</b> | <b>Scale</b> | <b>Comments</b>   | <b>Gift Session Sample Data</b> | <b>Pledge Session Sample Data</b> |
|-----------------|--------------------|-------------|---------------------|------------------|--------------|---|---------------------------------|-----------------------------------|
| 76              | GP_LOAD_STATUS     | char        | 1                   | NA               | NA           | <i>PROCESS GENERATED</i><br>– Do not enter any values. Indicates whether the gift or pledge was processed or suspended by AVPGPLOA.   | <i>Leave blank</i>              | NA                                |
| 77              | SESSION_NO         | char        | 11                  | NA               | NA           | <i>PROCESS GENERATED</i><br>– Do not enter any values. Session Number created by AVPGPLOA.  | <i>Leave blank</i>              | NA                                |
| 78              | GIFT_NO            | char        | 11                  | NA               | NA           | <i>PROCESS GENERATED</i><br>– Do not enter any values. Gift Number created by AVPGPLOA.   | <i>Leave blank</i>              | NA                                |
| 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                              | <i>Leave blank</i>                |
| 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                            | <i>Leave blank</i>                |
| 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: <ul style="list-style-type: none"> <li>• AE = American Express</li> <li>• DC = Diners' Club</li> <li>• DI = Discover</li> <li>• MC = Master Card</li> <li>• VI = Visa</li> </ul> | VI                              | <i>Leave blank</i>                |
| 82              | AV_CR_CARD_NBR     | char        | 44                  | NA               | NA           | The credit card number to which the donor is charging the gift.   | 4111111<br>1111111<br>11        | <i>Leave blank</i>                |

## Chapter 23

# Delivered Workflows for Contributor Relations

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## 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" (Campus Self Service ).

### Description

| <i>Information Type</i> | <i>Description</i>  |
|-------------------------|---|
| 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

| <i>Information Type</i> | <i>Description</i>   |
|-------------------------|--|
| Workflow Objects        | Event<br>AV_OUTR_SEND Page PeopleCode  |
| Workflow Actions        | Role<br>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" (Campus Self Service ).

### Description

| <i>Information Type</i> | <i>Description</i>  |
|-------------------------|---|
| 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. |

| <b>Information Type</b> | <b>Description</b>  |
|-------------------------|---|
| Action Description      | The development officer completes an action and prepares to enter the contact report. From the contact report, the officer clicks the <b>Send Biodemo Update</b> button to create the email text. The system sends the email workflow when the user clicks the <b>Send</b> button.  |
| Notification Method     | The system sends an email notification with the biodemographic information update to the specified person (s) who handle record updates. Fields utilized in the email text include: Constituent ID, Constituent Name, and the sender's Name. The user can edit the information that appears by default on the Send Contact Report page. |

## Workflow Objects

| <b>Information Type</b> | <b>Description</b>  |
|-------------------------|---|
| Event                   | AV_OUTR_BIO_SEND Page PeopleCode  |
| Workflow Action         | This workflow starts manually when the user clicks the <b>Send</b> 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

| <i>Information Type</i> | <i>Description</i>  |
|-------------------------|---|
| 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 <b>Send Report</b> button to create the email text. The system begins the email workflow when the user clicks the <b>Send</b> 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

| <i>Information Type</i> | <i>Description</i>   |
|-------------------------|--|
| Event                   | AV_OUTR_BIO_SEND Page PeopleCode   |
| Workflow Action         | This workflow starts manually when the user clicks the <b>Send</b> 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. |

| <b><i>Information Type</i></b> | <b><i>Description</i></b>  |
|--------------------------------|--|
| Business Process               | AV_OUTR_SEND   |
| Business Activity              | AV_OUTR_SEND Outreach Send Data includes three steps:<br>1) Submit Data, 2) Trigger email Contact Report, 3) Email Outreach Data |
| Business Event                 | Send Report  |



## Chapter 24

# Contributor Relations Reports

## Contributor Relations Reports: A to Z

This table lists the Contributor Relations reports, sorted by report ID.

| <b>Report ID and Report Name</b>             | <b>Description</b>   | <b>Navigation</b>   | <b>Run Control Page</b> |
|--|--|---|-------------------------|
| AV702<br>Graduates to Alumni                 | Lists graduates selected for the process and their constituent types. (Reporting tool: BI Publisher)   | <b>Contributor Relations &gt; Constituent Information &gt; People &gt; Process Biodemo Information &gt; Graduates to Alumni</b> | AV_RUNCTL_CONFR         |
| AV703<br>Pledge Schedule Aging               | Lists past-due pledge amounts by time period and business unit. (Reporting tool: BI Publisher)   | <b>Contributor Relations &gt; CR Reports &gt; Giving Reports &gt; Pledge Schedule Aging</b>                                     | AV_RUNCTL_PLAGE         |
| AV704<br>Electronic Payment Processing Audit | Lists electronic payment transaction requests, sorted by status. (Reporting tool: BI Publisher)  | <b>Contributor Relations &gt; Session Management &gt; Process Electronic Payments &gt; EP Run Review</b>                        | AV_EP_RUN_DETAIL        |
| AVCAMPRO<br>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) | <b>Contributor Relations &gt; CR Reports &gt; Giving Reports &gt; Campaign Progress Report</b>                                  | AV_RUNCTL_CAMPR         |
| AVDESDNR<br>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)  | <b>Contributor Relations &gt; CR Reports &gt; Giving Reports &gt; Designation Donor List</b>                                    | AV_RUNCTL_DESDN         |

| <b>Report ID and Report Name</b>                     | <b>Description</b>   | <b>Navigation</b>  | <b>Run Control Page</b> |
|--|--|--|-------------------------|
| AVGCINIT<br>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) | <b>Contributor Relations &gt; Session Management &gt; Giving Clubs &gt; Process Giving Clubs</b> | AV_RUNCTL_GCLUBS        |
| AVPCAE, GFTINC, GFTINCII, and GFTINCIV<br>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)  | <b>Contributor Relations &gt; CR Reports &gt; Giving Reports &gt; CAE Report</b>                 | AV_RUNCTL_CAE           |
| AVROLE<br>Role Assignments report                    | Summarizes information about the prospect assignments for a resource for a particular role. (SQR)  | <b>Contributor Relations &gt; CR Reports &gt; Role Assignments</b>                               | AV_RUNCTL_ROLE          |

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## 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.

| <b><i>Field or Control</i></b> | <b><i>Description</i></b>   |
|--------------------------------|---|
| <b>Institution</b>             | Displays the name of the institution for which you are viewing campaign progress.         |
| <b>Campaign</b>                | Displays the name of the campaign at your institution for which you are viewing progress. |

| <b>Field or Control</b>           | <b>Description</b>  |
|-----------------------------------|---|
| <b>Reporting Level</b>            | <p>Displays the level assigned to the campaign for reporting purposes. The highest reporting level possible is 1. Reporting levels are used when assigning related initiatives to a campaign.</p> <p>If you selected the <b>Include Related Campaigns</b> 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.</p> |
| <b>Financial Goal</b>             | Displays the overall financial goal of the campaign.  |
| <b>Percent of Goal</b>            | 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.  |
| <b>Current Operations to Date</b> | 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.   |
| <b>Capital Projects to Date</b>   | 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.   |
| <b>Endowment to Date</b>          | 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.   |
| <b>Total Commitments to Date</b>  | 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.   |
| <b>Cash/GIKs to Date</b>          | 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.   |

| <b>Field or Control</b>                  | <b>Description</b>  |
|--|---|
| <b>Outright Gifts to Date</b>            | 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.  |
| <b>Pledge To Date</b>                    | 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.   |
| <b>Pledge Payments To Date</b>           | 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.   |
| <b>Gifts-in-Kind to Date</b>             | 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.   |
| <b>Irrevocable Gifts - Present Value</b> | 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.   |
| <b>Irrevocable Gifts - Market Value</b>  | 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.                         |
| <b>Revocable Gifts - Present Value</b>   | 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.   |
| <b>Revocable Gifts - Market Value</b>    | 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.                           |
| <b>Nbr Donors</b> (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. |

| <b>Field or Control</b>                            | <b>Description</b>  |
|--|---|
| <b>Nbr New Donors</b> (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.                    |
| <b>Nbr Volunteers</b> (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. |
| <b>Nbr Prospects</b> (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.                          |
| <b>Nbr Open Asks</b> (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.  |
| <b>Amt Open Asks</b> (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.   |
| <b>Nbr Declined Asks</b> (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.  |
| <b>Amt Declined Asks</b> (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.

| <b>Field or Control</b>                                 | <b>Description</b>   |
|---|--|
| <b>Business Unit</b>                                    | Displays the name of the business unit for which you are viewing commitments to a designation.   |
| <b>Designation</b>                                      | Displays the name of the fund at your institution for which you are viewing commitments. Designations are defined using the Designation Funds component.   |
| <b>Constituent Name</b>                                 | Displays the name of each constituent who has made a commitment to the designation within the parameters you defined for the report.   |
| <b>ID</b>   | Displays the ID of each constituent who has made a commitment to the designation within the parameters you defined for the report.   |
| <b>Cnst Type</b> (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.  |
| <b>Commitment Amount</b>                                | Displays the total monetary amount of gifts and pledge payments the donor has made and fulfilled to your institution for this designation.   |
| <b>Pledge Balance</b>                                   | Displays the total monetary amount of pledges the donor has made outstanding to your institution for this designation.   |
| <b>Group Count</b>                                      | Displays the total number of rows for organizations or the total number of rows for individuals contained in the report.   |
| <b>SubTotal Commit Amt</b> (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. |

| <b>Field or Control</b>                              | <b>Description</b>   |
|--|--|
| <b>SubTotal Pledge Bal</b> (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. |
| <b>Total Count</b>                                   | Displays the total number of rows contained in the report. Each donor to the designation is listed in a row of the report.   |
| <b>Total Commitment Amt</b>                          | Displays the sum of the subtotal commitment amount fields in the report.   |
| <b>Total Pledge Balance</b>                          | 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

[Generating Giving Club Memberships](#)

## 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.

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**Note:** The report sorts gifts by the donor's constituent type at the time the gift was made.

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The Individual constituent types listed below appear in Parts I, II, and III of the report.

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Alumni</b>           | (Column A) Former students who have earned some credit toward one of the degrees or diplomas at your institution (Constituent Type = 1, 2, 3). |

| <b>Field or Control</b> | <b>Description</b>   |
|-------------------------|--|
| <b>Parents</b>          | (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). |
| <b>Other</b>            | (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.

| <b>Field or Control</b>            | <b>Description</b>   |
|------------------------------------|--|
| <b>Foundations</b>                 | (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).  |
| <b>Corporations and Businesses</b> | (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). |
| <b>Religious Organizations</b>     | (Column G) Churches, synagogues, temples, and their service groups (Constituent Type = 16).  |
| <b>Fund-Raising Consortia</b>      | (Column H) Entities formed by a group of cooperating institutions or organizations for the purpose of fund-raising activities (Constituent Type = 14).   |
| <b>Other</b>                       | (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.

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**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.

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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.

| <b>Field or Control</b>                      | <b>Description</b>  |
|--|---|
| <b>Institution</b>                           | Displays the name of the institution for which you are viewing assignments by role.   |
| <b>Role</b>                                  | Displays the role for which you are viewing resource assignments. Roles are the part the resource assumes in the cultivation process such as <i>Prospect Manager</i> , <i>Campaign Manager</i> , and so on.                                   |
| <b>Sort Order/Sort By</b>                    | Indicates whether you are viewing assignments in ascending or descending order by count, ID, or name.   |
| <b>Staff ID, Volunteer ID, and Unit Code</b> | 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. |
| <b>Name</b>                                  | Displays the name of the resource with assignments that fall within the parameters that you set for this report.  |
| <b>Number of Assignments</b>                 | 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.

| <b>Field or Control</b>                      | <b>Description</b>  |
|--|---|
| <b>Staff ID, Volunteer ID, and Unit Code</b> | 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. |
| <b>Assigned Prospect</b>                     | Displays the name of the prospect assigned to the resource for an assignment that matches the parameters defined for the report.  |
| <b>Prospect ID</b>                           | Displays the ID of the prospect assigned to the resource for an assignment that matches the parameters defined for the report.  |

| <b>Field or Control</b>       | <b>Description</b>   |
|-------------------------------|--|
| <b>Campaign</b>               | Displays the campaign code and description for the campaign associated with this resource assignment. You select a campaign when you create the resource assignment.   |
| <b>Sps Link</b> (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 `sql.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](#)