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# Oracle's PeopleSoft 8 SP1 Contributor Relations Changes and Updates to PeopleSoft Contributor Relations

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**April 2007**

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## Changes and Updates to PeopleSoft Contributor Relations

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# PeopleSoft Contributor Relations Documentation Updates for SA Bundle #18

**Note.** This document is an update to the *PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook*. It describes the Product Update ID #656266 that was posted to Customer Connection in April 2007. Use this document in conjunction with your PeopleBook to maintain a complete set of documentation.

This document discusses changes related to updates and fixes delivered with SA Bundle #18. Specifically, it discusses how to:

- View matching gifts and enter external organization matching gift information.
- View organization financial information.
- End a lifetime membership.

## See Also

*PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook*, "Entering Commitments," Entering Gift and Pledge Payments

*PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook*, "Processing Commitments and Analyzing Giving History," Handling Matching Gifts

*PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook*, "Managing Constituent Data," Maintaining Organization Financial Information

*PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook*, "Managing Membership," Adjusting Membership Dues Payments

## Viewing Matching Gifts and Entering External Organization Matching Gift Information

This section discusses changes several pages that enable you to learn more about matching gifts and gifts to be matched.

### Pages Used to View Matching Gift Information

Page Name	Object Name	Navigation	Usage
External Org Matching Gifts	AV_MTCH_O_GIFT_SP	Click the Matching Gifts button on the Gift Entry page after selecting a gift type of matching gift.	Apply an organization's matching gift payment to a donor's gift.

Page Name	Object Name	Navigation	Usage
Outstanding Matching Gifts	AV_MTCH_P_LIST	Manage Contributor Relations, Enter Commitments, Use, Person Matching Gift, Outstanding Matching Gifts	View information about the expected matching gifts resulting from a donor's gifts.
Ext Org Matching Gift (external organization matching gift)	AV_MTCH_O_LIST	Manage Contributor Relations, Enter Commitments, Use, Ext Org Matching Gift, Ext Org Matching Gift	View the gifts that an organization is expected to match. Also mark a matching gift as denied.
Person Matching Gifts	AV_MTCH_P_INQ	<ul style="list-style-type: none"> <li>Manage Contributor Relations, Enter Commitments, Inquire, Person Matching Gifts</li> <li>Manage Contributor Relations, Analyze Giving History, Inquire, Person Matching Gifts</li> </ul>	View information about donors' gifts that are matched by external organizations.
Ext Org Matching Gift (external organization matching gift)	AV_MTCH_O_INQ	<ul style="list-style-type: none"> <li>Manage Contributor Relations, Enter Commitments, Inquire, Ext Org Matching Gifts</li> <li>Manage Contributor Relations, Analyze Giving History, Inquire, Ext Org Matching Gifts</li> </ul>	View information about donors' gifts that an organization has matched or declined to match.

## Entering Matching Gifts

Access the Matching Gifts page.

**Matching Gifts** First 1-5 of 5 Last

ID	Name	Gift Number	Gift Date	Exp Mtch Amt	Act Mtch Amt	Match Date
<input type="checkbox"/> AV0003	Talley,Judity	312	07/27/2005	1,500.00 USD		
<input type="checkbox"/> AV0011	Silver,Jonathan	313	07/27/2005	2,000.00 USD		
<input type="checkbox"/> AV0013	Newton,Dorian	311	07/27/2005	1,000.00 USD		
<input type="checkbox"/> AV0033	Lyon,Matthew	314	07/27/2005	2,500.00 USD		
<input type="checkbox"/> AV0037	Wale,Tanya	310	07/27/2005	1,500.00 USD		

### Matching Gifts page

The **Gift Number** and **Gift Date** fields are added to the page.

## Viewing Outstanding Matching Gifts

Access the Outstanding Matching Gifts page.

Outstanding Matching Gifts

Whitney,Christopher ID: AV0007

Constituent Type: [Alumni](#) Year: 1942 Institution: PSUNV

\*Time Frame:  Business Unit:

Business Unit	Gift Number	Gift Date	Name	Expected Match Amount	Actual Match Amount	Process Date	Denied Date	Details
1 MEDBU	325	04/10/2007	Organization Testing	490.00		04/10/2007		<a href="#">Details</a>

### Outstanding Matching Gifts page

The **Gift Number** field is added to this page. Click the **Details** link to view detailed information about a particular gift on the Gift Detail page.

## Viewing Expected Matching Gifts

Access the Ext Org Matching Gift page.

Ext Org Matching Gift

Ford Motor Company ID: AV1000

Constituent Type: [Foundation](#) Institution: PSUNV

\*Time Frame:  Business Unit:

Business Unit	Gift Number	Gift Date	Name	Expected Match Amount	Actual Match Amount	Process Date	Denied Date	Details
1 MEDBU	312	07/27/2005	Talley,Judity	2,990.00		07/27/2005		<a href="#">Details</a>
2 MEDBU	319	07/27/2005	O'Hara,Cathleen Mary	333.00				<a href="#">Details</a>




### Ext Org Matching Gift page

The **Gift Number** field is added to this page. Click the **Details** link to view detailed information about a particular gift on the Gift Detail page.


## Viewing Matching Gifts for People

Access the Person Matching Gifts page.

Person Matching Gifts

Whitley, Christopher      ID: AV0007        

Constituent Type: [Alumni](#)      Year: 1942      Institution: PSUNV

\*Time Frame:       Business Unit:       

								View All	First	1 of 1	Last
Business Unit	Gift Number	Gift Date	Org ID	Name	Expected Match Amount	Actual Match Amount	Denied Date	Details			
1 MEDBU	325	04/10/2007	AV5555	Organization Testing	490.00			<a href="#">Details</a>			

**Total Expected Amount:** 490.00 USD      **Total Actual Amount:** 0.00 USD      **Total Count:** 1





### [Person Matching Gifts page](#)

The **Gift Number** field is added to this page. Click the **Details** link to view detailed information about a particular gift on the Gift Detail page.


## Viewing Matching Gifts for Organizations

Access the Ext Org Matching Gifts inquiry page.

Ext Org Matching Gifts

Ford Motor Company      ID: AV1000         

Constituent Type: Foundation      Institution: PSUNV

\*Time Frame:       Business Unit:       

									View All	First	1-2 of 2	Last
Business Unit	Gift Number	Gift Date	ID	Name	Expected Match Amount	Actual Match Amount	Denied Date	Details				
1 MEDBU	312	07/27/2005	AV0003	Talley, Judith	2,990.00			<a href="#">Details</a>				
2 MEDBU	319	07/27/2005	AV0155	O'Hara, Cathleen Mary	333.00			<a href="#">Details</a>				

**Total Expected Amount:** 3,323.00 USD      **Total Actual Amount:** 0.00 USD      **Total Count:** 2

### [Ext Org Matching Gifts inquiry page](#)

The **Gift Number** field is added to this page. Click the **Details** link to view detailed information about a particular gift on the Gift Detail page.

## Viewing Organization Financial Information

This section discusses changes in how the system calculates alumni count for an organization.

### Page Used to View Organization Financial Information

Page Name	Object Name	Navigation	Usage
Organization Financial Info (organization financial information)	AV_ORG_FIN_INFO AV_ORG_FIN_INFO_W	<ul style="list-style-type: none"> <li>Manage Contributor Relations, Manage Organizations, Use, Organization Financial Info</li> <li>Manage Contributor Relations, Manage Organizations, Workset, Organization Financial Info</li> </ul>	Maintain information about an organization's financial history and other statistical information.

## Entering Organization Financial Information

Access the Organization Financial Info page.

Organization Financial Info

Organization Testing ID: AV5555

Constituent Type: Corporation Institution: PSUNV

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**Organization Information**

Employee Count:  \*Cnst Type:  Corporation

Alumni Count:  Stck Exch:  Symbol:

Description:  SIC:

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

Fiscal Year:  From Date:  To Date:  + -

Revenue Amount:  USD Assets Amount:

Expenses Amount:  Liability Amount:

Profit/Loss Amount: 503,000.00 Equity Amount: 2,000,000.00

Source Description:  Contributions Total:  USD

Date:

[Organization Financial Info page](#)

**Alumni Count**

The system now 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.

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## Ending a Lifetime Membership

This section discusses changes that enable you to enter or change an end date on a lifetime membership during an adjustment session.

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### Pages Used to End a Lifetime Membership

Page Name	Object Name	Navigation	Usage
Member Adjust Summary	AV_ADJ_MBR_SMRY	Manage Contributor Relations, Manage Memberships, Use, Membership Adjustment, Member Adjust Summary	Select the membership transactions to adjust in this adjustment session.
Member Adjust	AV_ADJ_MBR	Manage Contributor Relations, Manage Memberships, Use, Membership Adjustment, Member Adjust	Make adjustments to an existing membership transaction you selected on the Membership Adjustment Summary page.

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### Adjusting Dues Payment Details

The **Expiration Date** field is now editable for all lifetime members. You can use it to change the end date for both regular and complimentary lifetime memberships.