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# Oracle's PeopleSoft 8 SP1 Bundle #19

## Changes and Updates to PeopleSoft Contributor Relations

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**June 2007**

**ORACLE®**

## Changes and Updates to PeopleSoft Contributor Relations

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# PeopleSoft Contributor Relations Documentation Updates for SA Bundle #19

**Note.** This document is an update to the *PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook*. It describes the Product Update ID #656271 that was posted to Customer Connection in June 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 #19. Specifically, it discusses how to:

- Review credit card activity.
- Define an initiative audience.
- Define mass action parameters.
- View planned giving details.

## See Also

*PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook*, "Processing Commitments and Analyzing Giving History," Reviewing Credit Card Activity

*PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook*, "Managing Initiatives," Defining an Initiative Audience

*PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook*, "Managing Prospects," Implementing a Prospect Plan

*PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook*, "Managing Planned Giving Prospects," Working with a Planned Giving Profile

## Reviewing Credit Card Activity

This section discusses how to:

- Review credit card processing messages.
- Review gift and membership transactions.

## Pages Used to Review Credit Card Activity

| Page Name                                    | Object Name  | Navigation  | Usage   |
|--|--------------|---|---|
| EP Transaction Processing – Transaction List | AV_EP_G_PROC | Manage Contributor Relations, Enter Commitments, Process, EP Transaction Processing | View the results of the EP transaction process via the Process Monitor. |

| Page Name                                     | Object Name     | Navigation   | Usage  |
|---|-----------------|--|--|
| EP Transaction Log Inquiry - Filter Options   | AV_EP_LOG_FLTR  | <ul style="list-style-type: none"> <li>• Manage Contributor Relations, Enter Commitments, Inquire2, EP Transaction Log Inquiry</li> <li>• Manage Contributor Relations, Manage Memberships, Inquire, EP Transaction Log Inquiry</li> </ul> | Enter selection criteria for the gifts or membership transactions to review.                                   |
| EP Transaction Log Inquiry - Transaction List | AV_EP_TRANS_LOG | Click the Search button on the EP Transaction Log Inquiry - Filter Options page.   | View the transactions that meet the criteria selected on the EP Transaction Log Inquiry - Filter Options page. |

## Reviewing Credit Card Processing Messages

When you run the Application Engine process, which sends credit card transactions to a CR merchant for credit card processing, you can use PeopleSoft Process Monitor (Process Monitor, Details, Message Log) to view the job status and the messages that the system sends during the process.

**Message Log**

| Process          |             |                     |                       |
|------------------|-------------|---------------------|-----------------------|
| <b>Instance:</b> | 524         | <b>Type:</b>        | Application Engine    |
| <b>Name:</b>     | AV_EP_BATCH | <b>Description:</b> | CR EPay Batch Program |

[Customize](#) | [Find](#) | [View All](#) | First ◀ 1-6 of 6 ▶ Last

| Severity | Log Time  | Message Text  | Explain                 |
|----------|-----------|---|-------------------------|
| 10       | 9:57:15AM | Program 'AV_EP_BATCH' Started 2007-05-24-09.57.15.000000                                      | <a href="#">Explain</a> |
|          | 9:57:21AM | Approve MEDBU.1.M.162.51 0  | <a href="#">Explain</a> |
|          | 9:57:22AM | Decline MEDBU.1.M.162.52 101  | <a href="#">Explain</a> |
| 10       | 9:57:22AM | Program 'AV_EP_BATCH' Completed 2007-05-24-09.57.22.000000                                    | <a href="#">Explain</a> |
|          | 9:57:40AM | Published message with Transaction ID of 52 to request to have report added in folder GENERAL | <a href="#">Explain</a> |
|          | 9:57:40AM | Successfully posted generated files to the report repository                                  | <a href="#">Explain</a> |

[Return](#)

### Message Log page example

The system now 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 (Design Student Administration, Define Contributor Relations, Setup, 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.

**Explain**

**Message:**  
Decline MEDBU.1.M.162.52 101

**Description:**  
Electronic Payment processing message. Parameters are return status message, merchant reference, and return status.

Format of the merchant reference is :  
Business Unit.  
Service Requested.  
Session Type.  
Session Number.  
Gift Number or Membership Payment Number

[Return](#)

### [Explain page example](#)

The Description portion of the page enables you to decode the message. Using this 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 = authsettle, 3 = settle, 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 *Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler*, "Using Process Monitor"

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## Reviewing Gift and Membership Transactions

Access the EP Transaction Log Inquiry - Transaction List page.

| EP Transaction Log Inquiry  |                 |                                    |   |
|---|-----------------|------------------------------------|---|
| Transaction List  |                 |                                    |   |
| <b>Institution:</b> PSUNV PeopleSoft University   |                 | <a href="#">Set Filter Options</a> |   |
|   |                 | View All                           | First <input type="button" value="◀"/> 1-9 of 9 <input type="button" value="▶"/> Last |
| <div style="display: flex; justify-content: space-between;"> <span>List</span> <span>Detail</span> <span><input type="button" value="☰"/></span> </div> |                 |                                    |   |
| Reference Number  | Sequence number | Payment Status                     | Credit Card Message 1   |
| 0000000000000002  | 1               | <a href="#">Authorized</a>         | ICS:1 SOK   |
| 0000000000000002  | 2               | <a href="#">Settled</a>            | ICS:1 SOK   |
| 0000000000000003  | 1               | <a href="#">Authorized</a>         | ICS:1 SOK   |
| 0000000000000003  | 2               | <a href="#">Declined</a>           | ICS:0 DINVALIDDATA  |
| 0000000000000003  | 3               | <a href="#">Manual</a>             | ICS:0 DINVALIDDATA  |
| 0000000000000004  | 1               | <a href="#">Declined</a>           | ICS:0 DCARDREFUSED  |
| 0000000000000005  | 1               | <a href="#">Authorized</a>         | ICS:1 SOK   |
| 0000000000000005  | 2               | <a href="#">Declined</a>           | ICS:0 DINVALIDDATA  |
| 0000000000000005  | 3               | <a href="#">Cancelled</a>          | ICS:0 DINVALIDDATA  |

[EP Transaction Log Inquiry – Transaction List page](#)

Click the **Payment Status** link to view system action details that relate to this transaction.

|                                      |  |                               |            |
|--------------------------------------|--|-------------------------------|------------|
| <b>Reference Number:</b>             | 0000000000000002                         | <b>Gift Number:</b>           |            |
| <b>Sequence number:</b>              | 1  | <b>Member Payment Number:</b> |            |
| <b>Transaction Date:</b>             | 06/06/2007                               | <b>ID:</b>                    | 8664       |
| <b>Business Unit:</b>                | MEDBU                                    | <b>Gift Amount:</b>           | 100.00 USD |
| <b>Session Number:</b>               |  | <b>Dues Amount:</b>           | USD        |
| <b>Tender Type:</b>                  | CC                                       | <b>Sequence Number:</b>       | 1          |
| <b>Payment Status:</b>               | Authorized                               |                               |            |
| <b>Credit Card Type:</b>             | VISA                                     |                               |            |
| <b>Credit Card Number:</b>           | ***** Last Four Digit: 1111              |                               |            |
| <b>Expiration Date:</b>              | 10 / 2010                                |                               |            |
| <b>Credit Card First Name:</b>       | Bruce                                    |                               |            |
| <b>Credit Card Last Name:</b>        | Carroll                                  |                               |            |
| <b>Service Provide:</b>              | Cybersource                              |                               |            |
| <b>Credit Card Request ID:</b>       | 1811449361020176846972                   |                               |            |
| <b>Request Token:</b>                | AHYJYjLo7GC3+FB8EAUieO7pSgEFInju6UoAJSPG |                               |            |
| <b>Authorization Datetime:</b>       | 2007-06-06T155100Z                       |                               |            |
| <b>Return Status:</b>                | 0  |                               |            |
| <b>Authorization Reply:</b>          | Approve                                  |                               |            |
| <b>Transaction Reference Number:</b> |  |                               |            |
| <b>Authorization Code:</b>           | 123456                                   | <b>Auth Date:</b>             | 06/06/2007 |
| <b>AVS Code:</b>                     | Y  |                               |            |

[AV\\_EP\\_TRANS\\_SP page \(1 of 2\)](#)

|                               |                                     |                     |       |
|-------------------------------|-------------------------------------|---------------------|-------|
| <b>Credit Card Message 1:</b> | ICS:1 SOK                           |                     |       |
| <b>Credit Card Message2:</b>  | Request was processed successfully. |                     |       |
| <b>Credit Card Message3:</b>  |                                     |                     |       |
| <b>Country:</b>               | USA                                 |                     |       |
| <b>Address Line 1:</b>        | 500 Oak                             |                     |       |
| <b>Address Line 2:</b>        |                                     |                     |       |
| <b>Address Line 3:</b>        |                                     |                     |       |
| <b>City:</b>                  | San Ramon                           |                     |       |
| <b>State:</b>                 | CA                                  | <b>Postal Code:</b> | 55555 |
| <b>Last Update Date/Time:</b> | 06/06/07 8:47:20AM                  |                     |       |
| <b>Last Update User ID:</b>   | PS                                  |                     |       |
| <b>Process Instance:</b>      |                                     |                     |       |

### [AV\\_EP\\_TRANS\\_SP page \(2 of 2\)](#)

The new **Request Token** field appears on this page. The **Last Update Date/Time**, **Last Update User ID**, and **Process Instance** fields are also added to 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 settle it (not an auth/settle request), the process must provide CyberSource with this request token when you submit the settlement request.

## Defining an Initiative Audience

This section discusses an enhancement to the PeopleBook documentation of the Initiative Audience Build page.

### Selection Process

When you select the Build Audience Process, the system launches the AVPINT COBOL process and builds the audiences for initiatives or membership organizations.

**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 will result 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.

## Defining Mass Action Parameters

This section discusses changes to the Mass Actions component.

## Pages Used to Define Mass Action Parameters

| Page Name    | Object Name  | Navigation   | Usage  |
|--------------|--------------|--|--|
| Mass Actions | AV_MASS_ACTN | <ul style="list-style-type: none"> <li>Manage Contributor Relations, Manage Prospects, Use, Mass Actions</li> <li>Manage Contributor Relations, Manage Prospects, Workset, Mass Actions</li> </ul> | Create an action for multiple prospects at one time. |

## Creating Mass Actions

Access the Mass Actions page.

Mass Actions

**\*Institution:** PSUNV PeopleSoft University

**\*Action:** Invitation to Banquet

**Description:** Invitation to President's Banquet 2007

**\*Planned Date:** 05/25/2007 **Expiration Date:** 09/01/2007

**\*Action Type:** INVIT Invitation **Contact Type:** LETTER Letter

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

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

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

**Assignment Type:** Staff **Responsible Person:** 8664 Carroll, Bruce

| Others Assigned |                          |      | View All | First | 1 of 1 | Last |
|-----------------|--------------------------|------|----------|-------|--------|------|
| Assignment Type | Resource Assigned        | Role |          |       |        |      |
| 1 Staff         | AV0022 Capozzelli, Mario | PRE  |          |       |        |      |

Mass Actions page (1 of 2)

**Initiatives** View All First 1 of 1 Last

| Initiative Type | Initiative Code |          |  |  |  |  |  |     |
|-----------------|-----------------|----------|--|--|--|--|--|-----|
| 1               | EVENT           | HOME2007 |  |  |  |  |  | + - |

**Persons Assigned to Action** View All First 1-6 of 6 Last

| EmpID | Name   |                    |
|-------|--------|--------------------|
| 1     | AV0001 | Gallegher, Shawn   |
| 2     | AV0002 | Isenberg, Robin    |
| 3     | AV0050 | Ratcliffe, Stephen |
| 4     | AV0015 | Lutz, Ruth         |
| 5     | AV0020 | Johnson, Shaqua    |
| 6     | AV0025 | Franken, Alan      |

Add

**Organizations Assigned to Action** View All First 1-6 of 6 Last

| External Org ID | Description |                                |
|-----------------|-------------|--------------------------------|
| 1               | AV1019      | The Other Corporation          |
| 2               | AV2030      | Bridgman Foundation            |
| 3               | AV1012      | American Enrichment Foundation |
| 4               | AV2000      | Lambert Manufacturing          |
| 5               | AV900041    | Software Inc.                  |
| 6               |             |                                |

Add

Process Actions

Mass Actions page (2 of 2)

**Linked Constituents**

**Workset Code:**  My Prospects

View All First 1-4 of 38 Last

| ID | Name   |                                |
|----|--------|--------------------------------|
| 1  | AV1000 | Ford Motor Company             |
| 2  | AV1010 | Bechtel Power Company          |
| 3  | AV1011 | Bechtel Foundation             |
| 4  | AV1012 | American Enrichment Foundation |

Process Actions

Mass Actions page: Workset group box

The **Description** and **Expiration Date** fields are added to this page. The **Initiatives** group box is also new for mass actions, and 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.

Click the **Process Actions** button to apply the action. The system displays a new Message Catalog message (14300,100) that identifies how many people and organization constituent action records were added.

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.

## Viewing Planned Giving Details

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 View Planned Giving Details

| Page Name                 | Object Name                     | Navigation   | Usage   |
|---------------------------|---------------------------------|--|---|
| Planned Giving Profile    | AV_PG_PROFILE<br>AV_PG_PROFILE1 | <ul style="list-style-type: none"> <li>• Contributor Manage Contributor Relations, Manage Prospects, Use, Planned Giving Profile</li> <li>• Manage Contributor Relations, Manage Prospects, Inquire, Planned Giving Profile</li> </ul> | Summarize or review information about a constituent's participation as a prospective or actual donor of a planned gift. |
| Bequest Detail            | AV_BEQUEST1_SP                  | Click a Bequest link on the Planned Giving Profile page.   | View additional information about a bequest, including any assets, codicils, installments, or comments.                 |
| Trust Detail              | AV_TRUST1_SP                    | Click a Trust link on the Planned Giving Profile page.   | View information about a trust and its beneficiaries.   |
| Gift Annuity Detail       | AV_GIFTAN1_SP                   | Click a Gift Annuity link on the Planned Giving Profile page.  | View information about a gift annuity, its account information, and its beneficiaries.                                  |
| Pooled Income Fund Detail | AV_PINC1_SP                     | Click a Pooled Income Fund link on the Planned Giving Profile page.  | View detailed information about a donor's portion of a pooled income fund.  |

## Viewing a Planned Giving Profile

Access the Planned Giving Profile page.

Planned Giving Profile

Kuney,Dara ID: AV0010

Constituent Type: [Alumni](#) Year: 1979 Institution: PSUNV

Date of Birth: Date of Death:

Initial Request Date: PG Status:

Initial Response Date:  Include on PG Mailing List

| Planned Gifts   |  |                |            |                             |                          | View 4  |
|-----------------|--|----------------|------------|-----------------------------|--------------------------|---|
|                 |  |                |            |                             |                          | First <span style="font-size: small;">◀</span> 1-5 of 5 <span style="font-size: small;">▶</span> Last |
| Type            | Planned Gift Name                        | Inception Date | Start Date | Institution Estimated Value | Institution Actual Value | Irrevocable   |
| 1 Bequest       | <a href="#">Bequest</a>                  | 07/01/1968     |            | 1,000,000.00                | 500,000.00               |   |
| 2 Trust         | <a href="#">Dara Kuney Trust 2</a>       | 07/01/1999     | 07/01/1999 | 50,000.00                   | 60,000.00                | <input checked="" type="checkbox"/>   |
| 3 Trust         | <a href="#">Dara Kuney Trust</a>         | 07/01/1998     | 07/01/1998 | 150,000.00                  |                          | <input checked="" type="checkbox"/>   |
| 4 Gift Annuity  | <a href="#">Dara Kuney Gift Annuity</a>  | 07/01/1998     | 07/01/1998 | 250,000.00                  | 300,000.00               | <input checked="" type="checkbox"/>   |
| 5 Pooled Income | <a href="#">PSUNV Pooled Income Fund</a> | 07/01/1996     |            | 25,000.00                   | 27,000.00                |   |

### Planned Giving Profile page

Click a **Planned Gift Name** link to view its specifics on the appropriate detail page.

## Viewing Bequest Details

Access the Bequest Detail page.

### Bequest Detail

#### Kuney,Dara

**ID:** AV0010

**Bequest Name:** Dara Kuney Bequest

**Bequest Date:** 07/01/1968

**Bequest Status:** Advised - Written

**Estimated Maturity:** 12/31/2000

**Status Date:** 11/18/1998

**Estimated Estate:** 2,000,000.00 USD

**Actual Maturity:** 06/15/1998

**Present Value:** 2,000,000.00

**Actual Estate:** 3,000,000.00

**Campaign:** College of Business Campaign

#### Benefit to Institution

**Estimated Value:** 1,000,000.00      **Percent:** 50      **Actual Value:** 500,000.00

#### Other Beneficiaries

View All    First ◀ 1-2 of 2 ▶ Last

| Beneficiary ID | Name           | Estimated Value | Percent | Actual Value |
|----------------|----------------|-----------------|---------|--------------|
|                | Smith,Jacob    | 500,000.00 USD  | 25      | 750,000.00   |
| AV0009         | Crosbie,Edward | 500,000.00 USD  | 25      | 750,000.00   |

#### Intended Distribution

View All    First ◀ 1 of 1 ▶ Last

| For                         | Business Unit | Designation Name  | Type    | Amount         |
|-----------------------------|---------------|-------------------|---------|----------------|
| College of Business Library | PSUNV         | Library Endowment | Interim | 750,000.00 USD |

#### External Contacts

View All    First ◀ 1 of 1 ▶ Last

| External Contact ID | Name           | Alliance | Start Date | End Date   |
|---------------------|----------------|----------|------------|------------|
| AV0002              | Isenberg,Robin | Attorney | 07/25/1971 | 06/25/1998 |

#### Assigned Staff

View All    First ◀ 1 of 1 ▶ Last

| Staff ID | Name             | Description      | Start Date | End Date   |
|----------|------------------|------------------|------------|------------|
| AV0022   | Capozzelli,Mario | Prospect Manager | 05/12/1992 | 01/03/2000 |

Bequest Detail page (1 of 2)

| ▼ Assets       |                                |              |                | View All | First | 1-2 of 2 | Last |
|----------------|--------------------------------|--------------|----------------|----------|-------|----------|------|
| Asset Category | Description                    | Asset Value  | Value Date     |          |       |          |      |
| Art            | Original Picasso - Blue Period | 250,000.00   | USD 07/01/1998 |          |       |          |      |
| Real Estate    | Home - Paradise Valley, AZ     | 1,000,000.00 | USD 07/01/1998 |          |       |          |      |

  

| ▼ Installments |                 |             |               | View All | First | 1-2 of 2 | Last |
|----------------|-----------------|-------------|---------------|----------|-------|----------|------|
| Expected Date  | Expected Amount | Actual Date | Actual Amount |          |       |          |      |
| 09/30/1998     | 500,000.00      | 10/01/1998  | 750,000.00    |          |       |          |      |
| 12/30/1998     | 500,000.00      | 01/03/2000  | 750,000.00    |          |       |          |      |

  

| ▼ Codicils |                   |                          | View All | First | 1 of 1 | Last |
|------------|-------------------|--------------------------|----------|-------|--------|------|
| Date       | Action to Will    | Description              |          |       |        |      |
| 11/11/1975 | Beneficiary Added | New spouse added to will |          |       |        |      |

  

| ▼ Comments                            |
|---------------------------------------|
| Copy of will in Planned Giving office |

[Return](#)

### [Bequest Detail page \(2 of 2\)](#)

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.

See *PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook*, "Managing Planned Giving Prospects," Tracking Bequests.

## Viewing Trust Details

Access the Trust Detail page.

### Trust Detail

## Kuney,Dara

**Trust Name:** Dara Kuney Trust 2

**Trust ID:** 987654321

**Trust Type:** Unitrust

**Trust Category:** Regular Trust

**Trust Term:** One Life

**Principal:** 75,000.00 USD

**Payout Type:**

**Payout Term:**

**Campaign:** Campaign 2000

**ID:** AV0010

**Trust Status:** Active

**Inception Date:** 07/01/1999

**Start Date:** 07/01/1999

**Estimated Maturity:** 07/01/2020

**Trustee Fees:** 500.00

Irrevocable

**Benefit to Institution**

|   |  |
|---|--|
| <b>Institution Estimated Value:</b> 50,000.00 | <b>Institution Actual Value:</b> 60,000.00 |
|---|--|

**Other Beneficiaries** View All First 1-2 of 2 Last

| Beneficiary ID | Name              | Status | Estimated Value | Actual Value |
|----------------|-------------------|--------|-----------------|--------------|
|                | Kuney,John        | 2nd    | 10,000.00 USD   | 10,000.00    |
| AV0050         | Ratcliffe,Stephen | 1st    | 10,000.00 USD   | 10,000.00    |

**Intended Distribution** View All First 1-2 of 2 Last

| For                        | Business Unit | Designation Name         | Type    | Amount        |
|----------------------------|---------------|--------------------------|---------|---------------|
| Women's Athletics          | PSUNV         | Women's Softball Program | Interim | 25,000.00 USD |
| Women's Basketball Program |               |                          | Interim | 25,000.00 USD |

**External Contacts** View All First 1-2 of 2 Last

| External Contact ID | Name           | Alliance   | Start Date | End Date |
|---------------------|----------------|------------|------------|----------|
| AV0042              | Skeen,Jonathan | Attorney   | 11/25/1985 |          |
|                     | Truman,John J. | Accountant | 07/25/1987 |          |

[Trust Detail page \(1 of 2\)](#)

| Assigned Staff               |                   |                  |            |            |
|------------------------------|-------------------|------------------|------------|------------|
| View All First 1-2 of 2 Last |                   |                  |            |            |
| Staff ID                     | Name              | Description      | Start Date | End Date   |
| AV0022                       | Capozzelli, Mario | Prospect Manager | 05/15/1992 |            |
| AV0024                       | Perkins, Darla    | Solicitor        | 06/30/1997 | 01/03/1999 |

  

| Trust Value                  |               |              |              |
|------------------------------|---------------|--------------|--------------|
| View All First 1-3 of 4 Last |               |              |              |
| Value Date                   | Market Value  | Future Value | Value Source |
| 08/01/1999                   | 77,000.00 USD | 72,000.00    | TrustRite    |
| 08/01/2000                   | 80,000.00 USD | 77,000.00    | TrustRite    |
| 08/01/1999                   | 77,000.00 USD | 72,000.00    | TrustRite    |

  

| Trust Gift Information   |               |                      |              |            |  |  |  |                              |  |  |  |            |              |           |              |            |               |           |           |            |               |           |           |
|--|---------------|----------------------|--------------|------------|--|--|--|------------------------------|--|--|--|------------|--------------|-----------|--------------|------------|---------------|-----------|-----------|------------|---------------|-----------|-----------|
| <b>Total Contributions:</b>  | 50,000.00 USD | <b>Total Income:</b> | 3,400.00     |            |  |  |  |                              |  |  |  |            |              |           |              |            |               |           |           |            |               |           |           |
| Gift Information   |               |                      |              |            |  |  |  |                              |  |  |  |            |              |           |              |            |               |           |           |            |               |           |           |
| View All First 1 of 1 Last   |               |                      |              |            |  |  |  |                              |  |  |  |            |              |           |              |            |               |           |           |            |               |           |           |
| <b>Gift Amount:</b>  | 25,000.00     | <b>Gift Date:</b>    | 01/01/1999   |            |  |  |  |                              |  |  |  |            |              |           |              |            |               |           |           |            |               |           |           |
| <table border="1"> <thead> <tr> <th colspan="4">Gift Value</th> </tr> <tr> <td colspan="4" style="text-align: right;">View All First 1-2 of 2 Last</td> </tr> <tr> <th>Value Date</th> <th>Future Value</th> <th>Liability</th> <th>Value Source</th> </tr> </thead> <tbody> <tr> <td>07/01/1998</td> <td>27,000.00 USD</td> <td>10,000.00</td> <td>TrustRite</td> </tr> <tr> <td>07/01/1999</td> <td>30,000.00 USD</td> <td>12,000.00</td> <td>TrustRite</td> </tr> </tbody> </table> |               |                      |              | Gift Value |  |  |  | View All First 1-2 of 2 Last |  |  |  | Value Date | Future Value | Liability | Value Source | 07/01/1998 | 27,000.00 USD | 10,000.00 | TrustRite | 07/01/1999 | 30,000.00 USD | 12,000.00 | TrustRite |
| Gift Value   |               |                      |              |            |  |  |  |                              |  |  |  |            |              |           |              |            |               |           |           |            |               |           |           |
| View All First 1-2 of 2 Last   |               |                      |              |            |  |  |  |                              |  |  |  |            |              |           |              |            |               |           |           |            |               |           |           |
| Value Date   | Future Value  | Liability            | Value Source |            |  |  |  |                              |  |  |  |            |              |           |              |            |               |           |           |            |               |           |           |
| 07/01/1998   | 27,000.00 USD | 10,000.00            | TrustRite    |            |  |  |  |                              |  |  |  |            |              |           |              |            |               |           |           |            |               |           |           |
| 07/01/1999   | 30,000.00 USD | 12,000.00            | TrustRite    |            |  |  |  |                              |  |  |  |            |              |           |              |            |               |           |           |            |               |           |           |

  

| Trust Account Information   |               |                |       |         |  |                              |  |      |         |            |               |            |               |
|---|---------------|----------------|-------|---------|--|------------------------------|--|------|---------|------------|---------------|------------|---------------|
| Account Information   |               |                |       |         |  |                              |  |      |         |            |               |            |               |
| View All First 1 of 2 Last  |               |                |       |         |  |                              |  |      |         |            |               |            |               |
| <b>Item Type:</b>   | 000000100039  | <b>Type:</b>   | Asset |         |  |                              |  |      |         |            |               |            |               |
| <b>Last Updated:</b>  | 11/18/1998    | Carroll, Bruce |       |         |  |                              |  |      |         |            |               |            |               |
| <table border="1"> <thead> <tr> <th colspan="2">Balance</th> </tr> <tr> <td colspan="2" style="text-align: right;">View All First 1-2 of 2 Last</td> </tr> <tr> <th>Date</th> <th>Balance</th> </tr> </thead> <tbody> <tr> <td>07/01/1999</td> <td>50,000.00 USD</td> </tr> <tr> <td>07/01/1998</td> <td>25,000.00 USD</td> </tr> </tbody> </table> |               |                |       | Balance |  | View All First 1-2 of 2 Last |  | Date | Balance | 07/01/1999 | 50,000.00 USD | 07/01/1998 | 25,000.00 USD |
| Balance   |               |                |       |         |  |                              |  |      |         |            |               |            |               |
| View All First 1-2 of 2 Last  |               |                |       |         |  |                              |  |      |         |            |               |            |               |
| Date  | Balance       |                |       |         |  |                              |  |      |         |            |               |            |               |
| 07/01/1999  | 50,000.00 USD |                |       |         |  |                              |  |      |         |            |               |            |               |
| 07/01/1998  | 25,000.00 USD |                |       |         |  |                              |  |      |         |            |               |            |               |

  

| Comments  |
|---|
| Dara wants to ensure the institution gets a sizable gift while providing an income stream to herself for the next 20 years. |

[Trust Detail page \(2 of 2\)](#)

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The fields on this page are the same as those in the Trust Details component.

See *PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook*, "Managing Planned Giving Prospects," Tracking Trusts.

## Viewing Gift Annuity Details

Access the Gift Annuity Detail page.

### Gift Annuity Detail

## Kuney,Dara

**Gift Annuity Name:** Dara Kuney Gift Annuity

**Gift Annuity Type:** Charitable

**Deferral Period:**

**Rate:** 6.80

**Asset Category:** Real Estate

**Gift Amount:** 250,000.00 USD

**Reserve:** 100,000.00

**Campaign:** Campaign 2000

**ID:** AV0010

**Inception Date:** 07/01/1998

**Start Date:** 07/01/1998

**Gift Annuity Status:** Active

**Gift Annuity Date:** 07/01/2008

**Liability:** 150,000.00

**Irrevocable**

**Benefit to Institution**

|  |   |
|--|---|
| <b>Institution Estimated Value:</b> 250,000.00 | <b>Institution Actual Value:</b> 300,000.00 |
|--|---|

▼ **Other Beneficiaries** View All First 1 of 1 Last

|             |         |  |
|-------------|---------|--|
| Beneficiary | Details |  |
|-------------|---------|--|

| Beneficiary ID | Name              | Status | Estimated Value | Actual Value |
|----------------|-------------------|--------|-----------------|--------------|
| AV0050         | Ratcliffe,Stephen | 1st    | 10,000.00 USD   | 7,500.00     |

▼ **Intended Distribution** View All First 1-2 of 2 Last

| For                        | Business Unit | Designation Name           | Type    | Amount         |
|----------------------------|---------------|----------------------------|---------|----------------|
| Women's Athletics          | PSUNV         | Women's Softball Program   | Interim | 125,000.00 USD |
| Women's Basketball Program | PSUNV         | Women's Basketball Program | Interim | 125,000.00 USD |

▼ **External Contacts** View All First 1 of 1 Last

| External Contact ID | Name           | Alliance | Start Date | End Date |
|---------------------|----------------|----------|------------|----------|
| AV0042              | Skeen,Jonathan | Attorney | 11/25/1985 |          |

[Gift Annuity Detail page \(1 of 2\)](#)

| Assigned Staff |                   |                  |            |          |
|----------------|-------------------|------------------|------------|----------|
| Staff ID       | Name              | Description      | Start Date | End Date |
| AV0022         | Capozzelli, Mario | Prospect Manager | 07/15/1995 |          |

| Account Information |             |       |
|---------------------|-------------|-------|
| Item Type           | Description | Type  |
| 000000100039        |             | Asset |

Comments

Dara wants to ensure the institution gets a sizable gift while providing an income stream to her two grandchildren.

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### [Gift Annuity Detail page \(2 of 2\)](#)

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See *PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook*, "Managing Planned Giving Prospects," Tracking Gift Annuities.

## Viewing Pooled Income Fund Details

Access the Pooled Income Fund Detail page.

### Pooled Income Fund Detail

**Kuney,Dara**

**ID:** AV0010

**Pooled Income Fund Name:** PSUNV Pooled Income Fund

**Pooled Income Fund Type:** Balanced

**Inception Date:** 07/01/1996

**Total Contributions:** 50,000.00 USD

**Status:** Active

**Campaign:** Campaign 2000

#### Benefit to Institution

**Institution Estimated Value:** 25,000.00      **Institution Actual Value:** 27,000.00

#### Units

View All    First ◀ 1 of 1 ▶ Last

| Date       | Units Held | Unit Value | Total Value   |
|------------|------------|------------|---------------|
| 07/01/1998 | 400        | 150.00     | 60,000.00 USD |

#### Other Beneficiaries

View All    First ◀ 1-2 of 2 ▶ Last

| Beneficiary ID | Name              | Status | Estimated Value | Actual Value |
|----------------|-------------------|--------|-----------------|--------------|
|                | Kuney,John        | 2nd    | 5,000.00 USD    | 5,500.00     |
| AV0050         | Ratcliffe,Stephen | 1st    | 5,000.00 USD    | 5,500.00     |

#### Intended Distribution

View All    First ◀ 1-2 of 2 ▶ Last

| For               | Business Unit | Designation Name           | Type    | Amount        |
|-------------------|---------------|----------------------------|---------|---------------|
| Women's Athletics | PSUNV         | Women's Softball Program   | Interim | 12,500.00 USD |
| Women's Athletics | PSUNV         | Women's Basketball Program | Interim | 12,500.00 USD |

#### External Contacts

View All    First ◀ 1-2 of 2 ▶ Last

| External Contact ID | Name           | Alliance   | Start Date | End Date |
|---------------------|----------------|------------|------------|----------|
| AV0042              | Skeen,Jonathan | Attorney   | 11/25/1985 |          |
|                     | Truman,John J  | Accountant | 07/25/1987 |          |

Pooled Income Fund Detail page (1 of 2)

| Assigned Staff |                   |                  |            |          |
|----------------|-------------------|------------------|------------|----------|
| Staff ID       | Name              | Description      | Start Date | End Date |
| AV0022         | Capozzelli, Mario | Prospect Manager | 05/15/1992 |          |

  

| Gift Information |           |                  |            |
|------------------|-----------|------------------|------------|
| Gift Amount:     | 25,000.00 | Units Purchased: | 200        |
|                  |           | Date:            | 07/01/1996 |

  

| Gift Value |               |           |
|------------|---------------|-----------|
| Value Date | Present Value | Liability |
| 09/01/1996 | 25,000.00 USD | 2,500.00  |

  

| Account Information |                              |         |
|---------------------|------------------------------|---------|
| Item Type           | Description                  | Type    |
| 000001000046        | Donor Suspense Account       | Asset   |
| 000001000055        | Advancement Clearing Account | Reserve |

  

**Comments**

Dara wants to ensure the institution gets a sizable gift while providing an income stream to her two grandchildren so in addition to her gift annuity she has become a participant in the PSUNV Pooled Income Fund

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[Pooled Income Fund Detail page \(2 of 2\)](#)

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See *PeopleSoft 8 SP1 Contributor Relations Solutions PeopleBook*, "Managing Planned Giving Prospects," Tracking Pooled Income Funds.