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PEOPLESOFT ENTERPRISE

Oracle's PeopleSoft 8.9 Contributor Relations

Changes and Updates for CS Bundle #14

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Changes and Updates for CS Bundle #14

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PeopleSoft Contributor Relations Changes and Updates for CS Bundle #14

Note. This document is an update to the *PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook*. It describes the Product Update ID #701891 that was posted to Customer Connection in April 2008. 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 CS Bundle #14.

See Also

PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook, "Managing Prospects," Completing Actions

Setting Up and Viewing Gifts and Pledges Tied to Actions

This section discusses changes related to how to:

- Change the default age for displayed gifts and pledges.
- View lists of gifts and pledges tied to actions.

Pages Used to Set Up and View Actions Tied to Gifts and Pledges

Page Name	Object Name	Navigation	Usage
Institution Installation 2	AV_INSTALL_INST2	Set Up SACR, Product Related, Contributor Relations, Install Contributor Relations, Institution Defaults, Institution Installation 2	Set up acknowledgement and receipt defaults for your institution.
Action Results	AV_CNST_ACTN3 AV_CNST_ACTN3_E	<ul style="list-style-type: none"> Contributor Relations, Prospect Management, Constituent Actions, Actions - Person, Action Results Contributor Relations, Prospect Management, Constituent Actions, Actions - Org, Action Results 	Complete an action and record its results.

Changing the Default Age for Displayed Gifts and Pledges

Access the Institution Installation 2 page.

Institution Installation		Institution Installation 2	
Institution: PSUNV PeopleSoft University			
Receipt			
Event ID: CR_AVAK		CR Acknowledgements	
Acknowledgement Priority		Acknowledgement	
Srvc Ind:	1	<input type="checkbox"/> Soft Credit	
Gift:	2	<input type="checkbox"/> Adjusted Gift	
Honor:	3	<input type="checkbox"/> Adjusted Pledge	
Memory:	4		
Deceased:	5		
		To Do List	
		Reminder Days:	60
		Currency Default	
		*Base Currency:	USD
		*Rate Type:	OFFIC
		Action Commitments	
		Gift Days:	60
		Pledge Days:	60

[Institution Installation 2 page](#)

Action Commitments

This additional 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. Previously, you could only retrieve information about gifts and pledges that were given and recorded in the past 60 days. Now the system will display 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.

Viewing Lists of Gifts and Pledges Tied to Actions

Access the Action Results page.

Prospect Action
Action Info
Action Results
Contact Report

James Street





Constituent Type: [Friend](#)

Action: TEST

ID: AD5501

Year: [None](#) PSUNV Prospect Manager: NONE

Action Type: Ask

Result Code: Gift

Complete Date: 04/01/2008

Expected Commitment: USD

Actual Commitment: 500.00

Pledge Number	Date	Pledge Amount
<input type="text"/>		

Action Gifts			Find View All	First	1 of 1	Last
*Gift Number	Gift Date	Gift Amount				
<input type="text" value="328"/>	03/28/2008	500.00 USD Details	+	-		

Action Results page

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.