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# Oracle's PeopleSoft 8.9 Bundle 10 Changes and Updates to PeopleSoft Contributor Relations

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**June 2007**

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## Changes and Updates to PeopleSoft Contributor Relations

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# PeopleSoft Contributor Relations Documentation Updates for CS Bundle #10

**Note.** This document is an update to the *PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook*. It describes the Product Update ID #656272 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 CS Bundle #10. Specifically, it discusses how to:

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

## See Also

*PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook*, "Processing Commitments,"  
Reviewing Credit Card Activity

*PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook*, "Managing Initiatives," Defining an  
Initiative Audience

*PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook*, "Managing Prospects,"  
Implementing a Prospect Plan

*PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook*, "Managing Planned Giving  
Prospects," Working with a Planned Giving Profile

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## Reviewing Credit Card Activity

This section discusses how to:

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

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## Pages Used to Review Credit Card Activity

Page Name	Object 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 via the Process Monitor.

Page Name	Object Name	Navigation	Usage
EP Transaction Log Inquiry - Filter Options	AV_EP_LOG_FLTR	Contributor Relations, Session Management, Process Electronic Payments, EP Transaction Log Inquiry	Enter 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**

**Instance:** 524                      **Type:** Application Engine  
**Name:** AV\_EP\_BATCH              **Description:** 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 (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.

**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 8.46 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>	
		Customize   Find   View All    First 1 of 1 Last	
<div style="display: flex; border-bottom: 1px solid black;"> <span style="border: 1px solid black; padding: 2px;">List</span> <span style="border: 1px solid black; padding: 2px; margin-left: 5px;">Detail</span> <span style="border: 1px solid black; padding: 2px; margin-left: 5px;"></span> </div>			
Reference Number	Sequence number	Payment Status	Credit Card Message 1
0000000000000002	1	<a href="#">Authorized</a>	ICS:1 SOK

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:</b>	
<b>Transaction Date:</b>	06/05/2007	<b>ID:</b>	KU0007
<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>	Betty		
<b>Credit Card Last Name:</b>	Locherty		
<b>Service Provide:</b>	Cybersource		
<b>Credit Card Request ID:</b>	1810629907000176846499		
<b>Request Token:</b>	AHYJYieJo0nMGqajEAUieO1UAwEFInjTVAMA8VN3		
<b>Authorization Datetime:</b>	2007-06-05T170315Z		
<b>Return Status:</b>	0		
<b>Authorization Reply:</b>	Approve		
<b>Transaction Reference Number:</b>			
<b>Authorization Code:</b>	123456	<b>Auth Date:</b>	06/05/2007
<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>Contributor Relations, Prospect Management, Stewardship Plans, Constituent Actions, Mass Actions</li> <li>Contributor Relations, Prospect Management, Stewardship Plans, Constituent Actions, Mass Actions - Workset</li> </ul>	Create an action for multiple prospects at one time.

## Creating Mass Actions

Access the Mass Actions page.

### Mass Actions

**\*Institution:**  PeopleSoft University

**\*Action:**

**Description:**

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

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

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

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

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

**Assignment Type:**  **Responsible Person:**  Locherty, Betty

Others Assigned			
	Assignment Type	Resource Assigned	Role
1	<input type="text" value="Staff"/>	<input type="text" value="AV0022"/> Capozzelli, Mario	<input type="text" value="PRE"/>

Mass Actions page (1 of 2)

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

	Initiative Type	Initiative Code	
1	EVENT	HOME2007	+ -

**Persons Assigned to Action** Customize | Find | 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 L	-
6	AV0022	Capozzelli,Mario	-

**Add**

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

	External Org ID	Description	
1	AV1019	The Other Corporation	-
2	AV3101	Toys4U	-
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:** MYPROS My Prospects

Customize | Find | View All | First 1-4 of 23 Last

	ID	Name	
1	AV0001	Gallegher,Shawn	-
2	AV0002	Isenberg,Robin	-
3	AV0003	Talley,Judith	-
4	AV0004	Holmgren,June	-

**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 AV_PG_PROFILE1	<ul style="list-style-type: none"> <li>• Contributor Relations, Prospect Management, Planned Giving, Update Planned Giving Profile</li> <li>• Contributor Relations, Prospect Management, Planned Giving, View 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

Dara Kuney

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

**Date of Birth:**

**Initial Request Date:**

**Initial Response Date:**




**ID:** AV0010

**Year:** 1979

**Date of Death:**

**PG Status:**

**Include on PG Mailing List**

**Institution:** PSUNV

Planned Gifts <span style="float: right; font-size: small;">Customize   Find   View 4   First 1-5 of 5 Last</span>							
	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					
<b>Dara Kuney</b>			<b>ID:</b>	AV0010	
<b>Bequest Name:</b>	Dara Kuney Bequest				
<b>Bequest Date:</b>	07/01/1968	<b>Bequest Status:</b>	Advised - Written		
<b>Estimated Maturity:</b>	12/31/2000	<b>Status Date:</b>	11/18/1998		
<b>Estimated Estate:</b>	2,000,000.00	USD	<b>Actual Maturity:</b>	06/15/1998	
<b>Present Value:</b>	2,000,000.00		<b>Actual Estate:</b>	3,000,000.00	
<b>Campaign:</b>	College of Business Campaign				
Benefit to Institution					
<b>Estimated Value:</b>	1,000,000.00	<b>Percent:</b>	50	<b>Actual Value:</b>	500,000.00
Other Beneficiaries					
<a href="#">Customize</a>   <a href="#">Find</a>   <a href="#">View All</a>   <a href="#">First</a> 1-2 of 2 <a href="#">Last</a>					
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					
<a href="#">Customize</a>   <a href="#">Find</a>   <a href="#">View All</a>   <a href="#">First</a> 1 of 1 <a href="#">Last</a>					
For	Business Unit	Designation Name	Type	Amount	
College of Business Library	PSUNV	Library Endowment	Interim	750,000.00	USD
External Contacts					
<a href="#">Customize</a>   <a href="#">Find</a>   <a href="#">View All</a>   <a href="#">First</a> 1 of 1 <a href="#">Last</a>					
External Contact ID	Name	Alliance	Start Date	End Date	
AV0002	Isenberg, Robin	Attorney	07/25/1971	06/25/1998	
Assigned Staff					
<a href="#">Customize</a>   <a href="#">Find</a>   <a href="#">View All</a>   <a href="#">First</a> 1 of 1 <a href="#">Last</a>					
Staff ID	Name	Role	Start Date	End Date	
AV0022	Capozzelli, Mario	Prospect Manager	05/12/1992	01/03/2000	

Bequest Detail page (1 of 2)

▼ Assets			
		Customize   Find   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			
		Customize   Find   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		
		Customize   Find   View All
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 Enterprise Contributor Relations 8.9 PeopleBook*, "Managing Planned Giving Prospects," Tracking Bequests.

## Viewing Trust Details

Access the Trust Detail page.

### Trust Detail

## Dara Kuney

**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:** Fixed Amount

**Payout Term:** Quarterly

**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

**Amount:** 1,500.00

**Percent:**

**Irrevocable**

**Benefit to Institution**

<b>Institution Estimated Value:</b>	50,000.00	<b>Institution Actual Value:</b>	60,000.00
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**Other Beneficiaries** Customize | Find | 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** Customize | Find | 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** Customize | Find | 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				
Customize   Find   View All    First 1-2 of 2 Last				
Staff ID	Name	Role	Start Date	End Date
AV0022	Capozzelli,Mario	Prospect Manager	05/15/1992	
AV0024	Perkins,Darla	Solicitor	06/30/1997	01/03/1999

Trust Value				
Customize   Find   View All    First 1-2 of 2 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

Trust Gift Information				
<b>Total Contributions:</b>	50,000.00	USD	<b>Total Income:</b>	3,400.00

Gift Information				
Find   View All   First 1 of 1 Last				
<b>Gift Amount:</b>	25,000.00	Gift	<b>Gift Date:</b>	01/01/1999

Gift Value				
Customize   Find   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				
Find   View All   First 1 of 2 Last				
<b>Item Type:</b>	000000100039		<b>Type:</b>	Asset
<b>Last Updated:</b>	11/18/1998	Locherty,Betty		

Balance		
Customize   Find   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.

Return

[Trust 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 Trust Details component.

See *PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook*, "Managing Planned Giving Prospects," Tracking Trusts.

## Viewing Gift Annuity Details

Access the Gift Annuity Detail page.

### Gift Annuity Detail

## Dara Kuney

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

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

**Intended Distribution** Customize | Find | 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

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

External Contacts				
			Customize   Find   View All	First ◀ 1 of 1 ▶ Last
External Contact ID	Name	Alliance	Start Date	End Date
AV0042	Skeen,Jonathan	Attorney	11/25/1985	

Assigned Staff				
			Customize   Find   View All	First ◀ 1 of 1 ▶ Last
Staff ID	Name	Role	Start Date	End Date
AV0022	Capozzelli,Mario	Prospect Manager	07/15/1995	

Account Information				
			Customize   Find   View All	First ◀ 1 of 1 ▶ Last
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.

Return

[Gift Annuity 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 Gift Annuity Details component.

See *PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook*, "Managing Planned Giving Prospects," Tracking Gift Annuities.

## Viewing Pooled Income Fund Details

Access the Pooled Income Fund Detail page.

### Pooled Income Fund Detail

## Dara Kuney

**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** Customize | Find | 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** Customize | Find | 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** Customize | Find | 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

[Pooled Income Fund Detail page \(1 of 2\)](#)

External Contacts				
Customize   Find   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	

Assigned Staff				
Customize   Find   View All    First 1 of 1 Last				
Staff ID	Name	Role	Start Date	End Date
AV0022	Capozzelli,Mario	Prospect Manager	05/15/1992	

Gift Information				
Find   View All   First 1 of 2 Last				
<b>Gift Amount:</b>	25,000.00	<b>Units Purchased:</b>	200	<b>Date:</b> 07/01/1996
Gift Value				
Customize   Find   View All    First 1 of 1 Last				
Value Date	Present Value		Liability	
09/01/1996	25,000.00	USD	2,500.00	

Account Information		
Customize   Find   View All    First 1-2 of 2 Last		
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

Return

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

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

See *PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook*, "Managing Planned Giving Prospects," Tracking Pooled Income Funds.