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PEOPLESOFT ENTERPRISE

Oracle's PeopleSoft 8.9 MP1 Contributor Relations Changes and Updates for CS Bundle #12

November 2007

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Changes and Updates for CS Bundle #12

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PeopleSoft Contributor Relations Changes and Updates for CS Bundle #12

Note. This document is an update to the *PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook*. It describes the Product Update ID #687640 that was posted to Customer Connection in November 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 #12. Specifically, it discusses changes related to how to view a person profile.

See Also

PeopleSoft Enterprise Contributor Relations 8.9 PeopleBook, “Managing Constituent Data,” Viewing Profiles

Viewing a Person Profile

This section discusses changes to the Person Profile page.

Page Used to View a Person Profile

Page Name	Object Name	Navigation	Usage
Person Profile	AV_PRSN_PROFILE AV_PRSN_PROFILE_W	<ul style="list-style-type: none"> Contributor Relations, Constituent Information, People, Person Profile Contributor Relations, Constituent Information, Workset, Workset Constituent Info, Person Profile - Workset Self Service, Outreach, View Prsn, Person Profile Self Service, Outreach, View Lists, Person Profile 	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

The system displays messages at the bottom of the page related to the following information:

Additional Information	Condition	Message
Organization Contacts	No data exists.	Not an Organization Contact

Viewing a Biographic Profile

Access the Person Profile page, Biographic Profile view.

Person Profile
Prospect Profile

Person Profile

Will Beatty ID: AV0500

Constituent Type: [Friend](#) Year: None Institution: PSUNV [FERPA](#)

Profile View: Biographic ▼

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

Clearance Required

Prospect Manager:

Biographic Information

Date of Birth: 01/24/1955	Date of Death:	Gender: Male
Ethnic Group:	Religious Preference:	Military Status: Not Indic.
Marital Status: Married	Spouse: Emily Beatty	




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


Address Type	Address	Effective Date	Status
Business	12345 Main Denver, CO 80137	10/16/2007	Active
Home	2563 Sheridan Avenue Downers Grove, IL 60515 Dupage	09/28/2004	Active

Person Profile page, Biographic Profile view (1 of 2)

Phone Numbers				
Phone Type	Prefix	Phone	Extension	Preferred
Business		312/644-2399		<input type="checkbox"/>
FAX		847/491-8546		<input type="checkbox"/>
Home		847/491-2311		<input checked="" type="checkbox"/>

Email Addresses		
Email Type	Email Address	Preferred
Business	wbeaty@genesis.com	<input checked="" type="checkbox"/>
Home	beaty@mediaone.net	<input type="checkbox"/>

Relationships				
Name	Relationship	Status	Constituent Type	Year
Beatty,Emily Suzanne	 Spouse	Active	Friend	
Beatty,Maura	 Daughter	Active	Alumni, Non-Degreed	
Ford Motor Company	 Employee	Active	Corporation	

Organization Contacts				
Organization	Contact Type	Job Title	Phone	Location
Ford Motor Company	 Charitable Giving Coordinator	Trustee	Phone	Location
Ford Foundation	 Charitable Giving Coordinator	Director of Goodwill	Phone	Location

Person Profile page, Biographic Profile view (2 of 2)

The Biographic Information data region is moved to the top of this view. To display all current information, the address, phone, and email data regions are now arranged in grids. If the most current address is inactive, it will appear in the grid.

Relationships



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.

Organization Contacts

If a person is a contact for an organization, this new data region appears. The region displays information derived from the Organization Contacts page.



Click this button to access the Organization Profile page of the organization for which the constituent is a contact.

Phone

Click this link to access the Contact Phone Information page for the constituent.

Location

Click this link to access the Contact Location Information for the constituent.

Viewing a Commitment Profile

Access the Person Profile page, Commitment Profile view.

▼ Lifetime Giving			
Lifetime Commitments	10,950.00	USD	Lifetime Hard Credits: 6,050.00
Lifetime Open Pledges:	3,500.00		Largest Pledge: 1,500.00
Lifetime Gifts/Payments:	7,450.00		Largest Gift: 5,000.00
▼ Historical Giving			
Total Year-to-Date Giving	0.00		First Gift Year: 2003
Total Prior Year Giving:	0.00		Total Years Giving: 2
Last Gift Date:	09/28/2004		Consecutive Years Giving: 0
Last Gift Amount:	5,000.00		Transaction Register

Person Profile page, Commitment Profile view

The **Transaction Register** link now appears in the Historical Giving data region. Click the link to access the Transaction Register page to view more giving details.