

PSU Foundation

Service Reference Guide

Updated 12/5/08

Located at:

2125 SW 4th Ave, Suite 510
Portland, OR 97201

Mailing Address:

PO Box 243
Portland, OR 97207

Help Desk:

503-725-4911

Main Line:

503-725-4911

Fax:

503-725-5876

Accounting Information:

Check Requests
Signature Cards
Scholarship Award Notification
Accounts Payable Information

Fund Transfers
Financial Statements
University Index Accounts
Stock Gifts
Endowed Accounts

Investment Accounting
Endowment Reporting
Cash Receipts

Joana Dinu

Phone: 503-725-8053

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Phuong Lam

Phone: 503-725-4473

E-mail: lamp@pdx.edu

John Rhoton

Phone: 503-725-8058

E-mail: jrhoton@pdx.edu

Gift Processing Information:

Gift Processing
Major Gift Report
Pledges
Gift & Pledge Acknowledgements and Reminders
In-Kind Gifts/Gifts to the University
Payroll Deductions
Corporate Matching Gifts
Monthly Credit Card Donations
Telefund Pledges and Gifts
New Accounts and Account Maintenance

Jordan Norris

Phone: 503-725-5070

E-mail: norrisj@pdx.edu

Database/Systems Information:

Please contact Teri Wingard to initiate all new project requests, including new event registrations, webpages, custom Apex Reports or database/systems projects.

Demographic Updates

Noelle Withington

Phone: 503-725-5079

E-mail: psuupdates@pdx.edu

Database Systems Management
One Event Registration, Constituent Connection, Relay
Log-in requests and support for Apex and One
Training: Apex and "One" Navigation and Modules:
 Constituents, Membership, Scholarship, Gift Clubs,
 Events, Prospect and Relay
Constituent Data Policies and Standards

Teri Dukes Wingard

Phone: 503-725-4917

E-mail: wingardt@pdx.edu

Campaign Codes – Setup and Questions
General Questions Regarding Database Coding
Software Support
Website Content

Network Administration
Email and Desktop Support
Security, backups and maintenance of IT systems

Custom Report Design (Apex and One)
Data Analysis and Auditing
Website updates

Report Requests
Data Analysis and Auditing
Mailing Files: please complete online request form at
<https://support.foundation.pdx.edu/tools/repreqone.jsp>
(Please allow 5 business days when requesting reports)

Administrative Information:

Board Management
Executive Leadership

Assistant to the Executive Director
Board Liaison
Ethnically Based Scholarships

Administrative Policies and Procedures
Accounting Management
Endowment and Investment Management
Real Estate Management

Administrative Assistant to the Chief Financial Officer
Grants
Cash Gifts

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