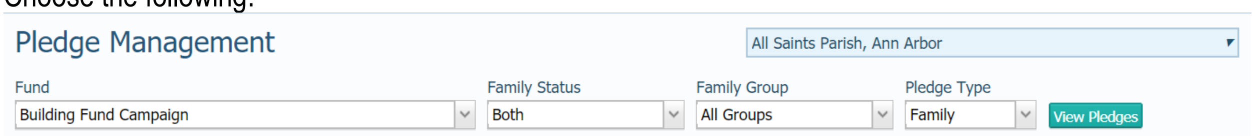
Our pledge cards came in and it is time to make our batch, post our pledges and make any payment that was received. We also need to review the reports for the pledges and send our statements.

Pledge Management for Pledges

1. Create a batch: Batch Description – **2019 Building Campaign**
2. Fund – **Building Fund Campaign**
3. Set the Cash total – **400.00**
4. Pledge total – **5500.00**
5. Batch Type: **Detail**
6. **Add Batch**
7. **Close**

Creating Pledges

1. From the Pledges Screen search for: Fund – **Building Fund Campaign**
2. Choose the following:



3. Click **View Pledges**
4. Click + **New Pledge**
5. Standard Pledge
   a. Search for envelope # **5618** – Scott and Sue Hines, click **radio button** next to name
   b. Click **Add Pledge**
   c. First Payment date – **Today's date** (First payment must be on or before the pledge date.)
   d. Pledge date – **Today's date**
   e. Pledge Amount – **1000.00**
   f. Frequency – **Monthly**
   g. # of Months – **12**
   h. Click **Add**
   i. Click **Ok**
6. Pledge with down payment and 6-month length
   a. Search for envelope # **1368** – Al and Eileen Graf, click **radio button** next to name
   b. Click **Add Pledge**
   c. First payment date – **Today's date**
   d. Start Date – **Today's date**
   e. Down Payment – **100.00**
   f. Pledge Amount – **700.00**
   g. # of months – **6**
   h. Statement Months - **Clear all,** select the appropriate months
   i. Click **Add**
   j. Click **OK**

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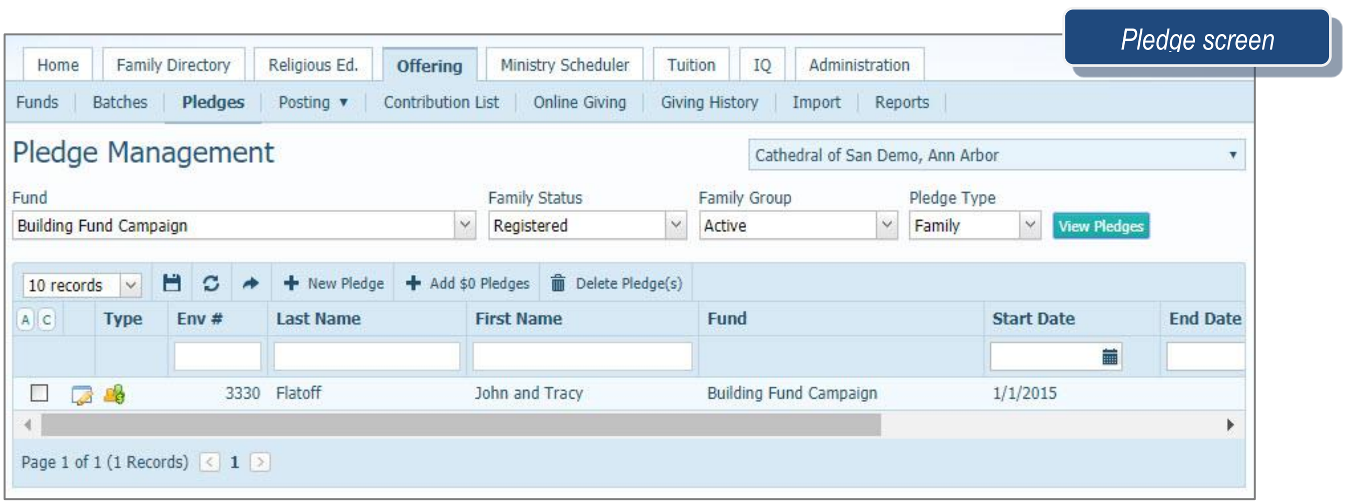
7. Quarterly Frequency
    a. Search for envelope # – **5317** – Cathleen Rigden
    b. Click **Add Pledge**
    c. First payment date – **Today's date**
    d. Pledge date – **Today's date**
    e. Pledge Amount: **3600.00**
    f. Frequency: **Quarterly**
    g. # of months: **36**
    h. Statement Months - **Clear all,** select the appropriate months
    i. Click **Add**
    j. Click **Ok**

8. Creating a Second Pledge to a family
    a. Envelope – **3330** – Todd and Jane Flatoff
    b. Click **Add Pledge**
    c. Click **Ok** to the message box of creating an additional pledge for the selected family
    d. Pledge date – **Today**
    e. First Payment Date – **Today**
    f. Pledge Amount **– 300.00**
    g. Frequency –**One Time Gift**
    h. # of Months – **1**
    i. Click **Add**
    j. Click **Ok**
    k. Click **Close**



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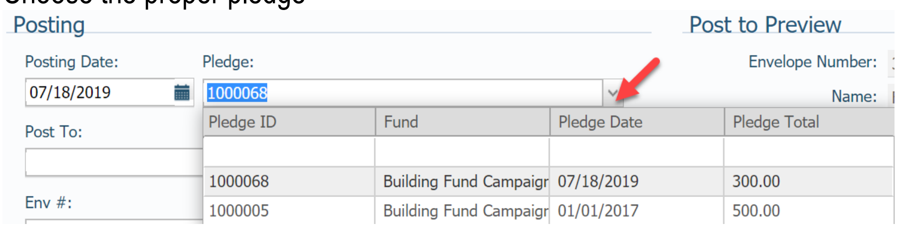
Posting a contribution to a Pledge

1. From the postings screen choose **Detail Posting**
2. Batch: **2019 Building Campaign**
    a. Posting Date: **Today's date**
    b. Envelope number **– 1368**
    c. Amount – **100.00**
    d. **Save**
3. Posting to a pledge when multiple pledges exist
    a. Envelope number – **3330**
    b. Amount – **300.00**
    c. Choose the proper pledge



    d. **Save**

Pledge Statements and Detail Report

1. Pledge Statements
    a. Fund – Choose **Building Fund Campaign**
    b. Click **Next**
    c. Select the Statement month and year – **This Month and Year**
    d. Pledge Filters – **View statements for all givers to this fund**
    e. Family Filters – **Registered, Active, All Groups**
    f. Balance Filters – **All available**
    g. Click **Next**
    h. Statement date – **Today's date**
    i. Payment due date – **1 month from today**
    j. Select/Create your body of statement
        i. Select the body of statement from the previous statements
    k. Click **Next**
    l. Select the givers you want to send a statement to
    m. Click **View Statements**
2. Pledge Detail report
    a. Fund – **Building Fund Campaign**
    b. Family Status – **Registered**
    c. Family Group – **Active**
    d. Pledge type – **Family**
    e. Choose **Date Range**
    f. Select **all pledges**
    g. **View Report**

3. Other reports available
    a. Non-Pledger List - If a member is not a pledger to the selected fund, his or her name and address appear in the Non-Pledger List report. The Total Active Pledges column provides additional information to let you know whether the member has current pledges to other funds.
    b. Past Due - Name and address of the family or member with the delinquent payment. Name of the fund to which the pledge was made. Total number of payments made by the family or member as of the date the report was generated. Total number of expected payments to date that satisfy the terms of the pledge. Total amount of the pledge. Payment shortfall amount.
    c. Pledger List – Choose one or more funds and the beginning and ending date rage you wish to report on. Lists the families, amount pledged, adjustments, paid, balance and provides a grand total at the bottom.
    d. Revenue Projection – Provides information on current year and the upcoming 4 years.

QUESTIONS FROM CLASS

1. Why would I use pledges?
2. Can pledges be modified after they're created?
3. Do I have to create a pledge from scratch for each donor?
4. How can I see which pledges are overdue on their payments?
5. How often do I generate pledge statements?

TIPS & TRICKS

- It's easy to create $0 pledges for each family so that you don't have to create each one individually
- The Past Due pledges report is a great report for your finance council
- Access to the Pledge Management screen is restricted to administrators and other users who have proper Fund Permissions
- The 'A' and 'C' buttons beneath the '10 Records' pull-down menu can be used to Select All records of Clear All Records

ANSWER KEY

1. Pledges are great to be able to track targeted amounts that donors have agreed to give. You can set up, track, add down payments, periodical payments and also send statements. 2. Yes. Find the pledge and click the edit button to the left
3. No. A $0 pledge can be created for all – or a subset – of parishioners and can be edited later when a pledge card is submitted
4. Run the Past Due report 5. This is completely up to you, but try to run them on a regular basis, such as monthly

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