Pledges
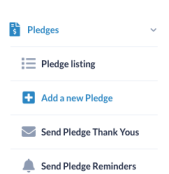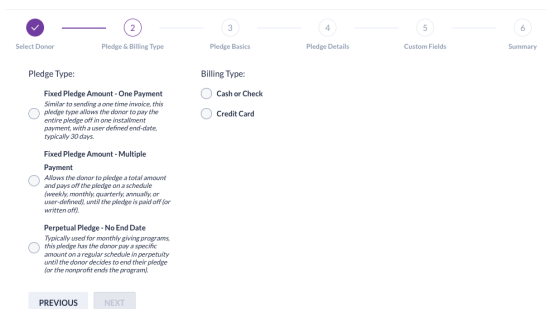
Add a New Pledge

A pledge is a financial contract between a donor and charity/organization that the donor promises to make payment on in the future.

1. Select **Pledges** section on the left navigation bar
2. Click on **Add a new Pledge**
   -
3. Search for the donor or **add a new donor** to the pledged gift
4. Choose the Pledge Type and complete the necessary steps

   1. **Fixed Pledge Amount – One Payment**
      - This pledge type is similar to sending a one-time invoice and allows the donor to pay the entire pledge balance in one payment.
         1. Choose the Billing Type of either **Cash or Check** or **Credit Card**
         2. Enter the **Total Amount** of the pledge
         3. Choose the Schedule
            - NOTE: Schedule is not applicable to a 1-time Fixed Pledge Amount, so the value entered is arbitrary.
         4. Enter the **Pledge Details**. For additional information on these fields please see our Glossary
         5. Enter custom field information, if applicable
         6. Review details, and **Submit**
   2. **Fixed Pledge Amount – Multiple Payment**
      - This pledge type allows the donor to pledge a total amount and pay the pledge on a schedule (weekly, monthly, quarterly, annually, or user defined), until the pledge is fully paid (or written off).
         1. Choose the Billing Type of either **Cash or Check** or **Credit Card**
         2. Enter the **Start Date**

3. Enter the **Total Amount** of the pledge
4. Choose the Schedule
   - Time frame the donor will be making scheduled payments

   > **Note**: Unusual allows you to set a custom timetable

5. Adjust the Overpayment Method settings, as needed
6. Adjust the Underpayment Method, as needed
7. Enter the **Pledge Details.** For additional information on these fields please see our Glossary
8. Enter custom field information, if applicable
9. Review details, and **Submit**

3. **Perpetual Pledge – No End Date**
   - This pledge type is used for monthly giving programs. The donor pays a specific amount on a regular schedule in perpetuity until the donor decides to end their pledge.
     1. Choose the Billing Type of either **Cash or Check** or **Credit Card**
     2. Enter the **Billing Amount** of the pledge
     3. Choose the Schedule
        - Time frame the donor will pay for this pledge
     4. Adjust the Overpayment Method settings, as needed
     5. Adjust the Underpayment Method, as needed
     6. Enter the **Pledge Details**. For additional information on these fields please see our Glossary
     7. Enter custom field information, if applicable
     8. Review details, and **Submit**

> **NOTE**: Pledge credit card payments set to automatically process will occur at 5:30 a.m. UTC.

Change Pledge Payment Type

> **NOTE**: Payment types changed to credit card will only change it for the one manually applied payment.

1. Select **Pledges** section on the left navigation bar
2. Click on **Pledge Listing**
3. Find the pledge and click on **APPLY PAYMENT**
4. Click on **Previous**
5. Change the Payment type

Cash or Check

Credit Card

PREVIOUS   NEXT

6. Click **Next** to now confirm the payment
7. When you get to Step 4, apply to
   - the proper payment account

New Transaction for Cora Spencer

✓ ——— 2 ——— ✓ ——— 4 ——— 5 ——— 6 ——— 7
Select Donor   Transaction Type   Gift Basics   Take Payment   Optional Details   Custom Fields   Summary

Take Payment

Select Payment Account
Card Options:
◉ 🔲 Cora (x1117)

PREVIOUS   NEXT

   - or add a payment account

New Transaction for Cedric Diggory

✓ ——— ✓ ——— ✓ ——— 4 ——— 5 ——— 6 ——— 7
Select Donor   Transaction Type   Gift Basics   Take Payment   Optional Details   Custom Fields   Summary

Take Payment

Select Payment Account

ADD NEW PAYMENT ACCOUNT

PREVIOUS   NEXT

8. Continue to confirm and submit payment for the pledge

Change Pledge Status

The status of a pledge can be changed between **Status Open** & **Status Write-Off**.

- 🗑 **Delete**
- ✏ **Apply Payment**
- ✏ Status Open
- ✏ **Status Write-Off**
- 👁 View Failed Payment Info

Status Open

When the pledge is in Status Open, perpetual (recurring) pledges will be billed based on the cadence selected (weekly, bi-weekly, monthly, quarterly, bi-annually, annually).

Status Write-Off

When a pledge is in Status Write-Off, this pledge will no longer be seen as funds needing to be collected or as future funding activity. This will stop future perpetual (recurring) pledges from being processed.

> **Important to Note**: If the status of a perpetual (recurring) pledge is modified to Status Write-Off, and at a future date, is then changed back to Status Open, this will trigger a charge for any missed recurring pledges. These will be charged daily until all missed recurring pledges are collected. It is recommended to create a new perpetual (recurring) pledge if a donor wants to have their pledge reinstated.