

How do I enter a Pledge?

Version 4.0

From the Pledges tab on a Contact record:

1. Click Enter New Pledge.

Contacts | Sort by: Id#

Member, Donor, Volunteer | Id# 3

First name: Melissa
Last name: Potter
Title: Owner
Spouse / Id#: 0

Dear (formal): Ms. Potter
Dear (casual): Melissa
Group: Experts
Other#:

Phone Numbers:
Home: 000/555-8254
Work: 000/555-3456
Fax: / -
Cell/Pager: 000/555-2205

A list: ☐
B list: ☐
Docent: ☐
Employee: ☐
Student: ☐
Volunteer: ☒

Setup Multimedia links: ☐ Stop Mail: ☐ Image Management:

Mailing Address: Primary ☒ Secondary ☐ From: / To: /

Name & Title: Melissa Potter
Company: Textile Technology Inc.
Address: 1234 North Main Street
City, St, Zip: Perfecttown HI 19345
Country: USA
Address change date: / /

E-mail: melissa@textech.com
Website:
Send e-mail:
View Website:
Field 1:
Field 2:
Field 3:
Field 4: / /
Field 5: 0.00
Field 6: 0.00

Pledges | Donations | Membership | Volunteer | Gifts In Kind | Planned Giving | Accessions | Loans | Giving Summary | Biography | Mail & Contact Log

Pledge Information:
Prospect Rating: Fair
Income level: \$75K-\$100K
Potential Pledge Amount: 20,000.00
Original Solicitor: Nancy Patterson
Current Solicitor: Nancy Patterson
Follow up date: 12/15/2007
Follow up type: Meeting
Last mailed or contacted: 11/30/2008 02:26 PM
Total Pledged: 600.00

Enter New Pledge

Pledges Double-click on pledge to view details or edit.

Pledge#	Start date	Amount	Balance	Pmt Interval	Campaign	Solicitor
62	05/30/2007	100.00	0.00	Single payment	2007 Fundraising Campaign	Nancy Patterson
63	05/01/2007	500.00	0.00	Single payment	2007 Fundraising Campaign	Nancy Patterson

Record 3 of 333 | Updated: 12/09/2013 01:37 PM | Updated by: Unknown | Update History

2. Select a Campaign, Campaign Activity, and Fund from the drop-down menus. If a Campaign has a default fund selected, it will automatically appear.

Enter a new pledge

Campaign: 2009 Annual Fund Drive
Campaign Activity: Annual Appeal Letter
Fund: General Operating Fund
Solicitor: Nancy Patterson
Pledge date: 01/07/2015

Amount: 0.00
No. of payments: 1
1st payment date: / /
Payment Interval: Single payment

In memory of:
In honor of:
Notes:
Don't send Reminder: ☐

Post | Thank you letter | Reminder Letter | Exit

3. Enter a Pledge Date. Today's date is entered automatically.
4. Select a Solicitor, if any, from the drop-down menu. The names on this list can be edited by going to the Main Menu | Setup | Authority Files | Solicitors.
5. Enter the Amount (the full pledge amount), then enter the date the first payment is expected in the 1st Payment Date field. A value must be entered into these fields for the pledge to be posted.
6. Enter the Number of Payments that can be expected, and a Payment Interval. PastPerfect will then generate the schedule of payments based on these fields. This schedule will divide the total amount pledged evenly between the number of payments.
7. Enter Notes and In Memory of or In Honor of names, if applicable.
8. If you do not want to send a reminder letter, check the Don't Send Reminder box.
9. Click Post.

Please note: Posting the pledge simply creates a pledge record. If the contact is also making the first payment on a pledge, you will need to enter the payment under the Donations screen and apply it to this pledge.

For more information on pledges, you can review Chapter 16 in your PastPerfect 4.0 User's Guide. If you have any questions, please contact our Support Office at 1-800-562-6080 or email support@museumsoftware.com. Thank you for using PastPerfect!