

# Manage Pledges

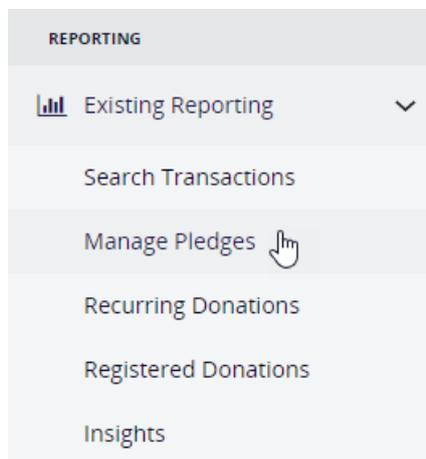
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The Manage Pledges reporting option lets you see everyone who has interacted with your activities, whether it is people who have donated, pledged, signed up to volunteer, etc. The Manage Pledges page allows you to view and export several key pieces of information that are frequently used with your activities, such as:

- [Moving donations](#)
- [Removing pledges and donations from the Fundraising Thermometer](#)

and more.

Go to **Reporting > Existing Reporting > Manage Pledges**



You start by filtering the information shown. If you want to see everything you can just click **Search**.

## Manage Pledges

Type

All  Fundraising  Crowdfunding

[Export](#)

Enter search criteria above and hit "search" button to run your report

Filter by:

- **Type:** All, Fundraising (everything except Crowdfunding and Peer-to-Peer Fundraising activities), or Crowdfunding Activities
- **Start/End Dates:** Provide a date range of the information
- **Campaign** and **Keyword:** Narrow your search to the active campaign or the specific activity
- **Phone Number:** For when you are looking for a specific pledge. This is most often used when you want to remove a pledge from a Fundraising Thermometer as [described here](#).

When you have the filters you want, click **Search**. You will be presented with a table with a snapshot of the information based on your filters.

← Previous 1 2 3 4 5 6 7 8 9 Next →

\*Displayed name may differ from primary contact's actual name

Name	Phone	Frequency	Date	Campaign	Keyword	Pledged Amount	Collected Amount	Status	Reminders	Action	
(no name)*		One Time	11/19/2019 14:41	MobileCause Fundamentals	99BALLOON	0.00	-	Donor Data Only	0	Collect	<input type="checkbox"/>
John Smith	██████████	One Time	09/04/2019 09:02	MobileCause Fundamentals	99BALLOON	0.00	-	Donor Data Only	0	Collect	<input type="checkbox"/>
Abraham Lincoln		One Time	09/04/2019 08:04	MobileCause Fundamentals	BALLOONS99	1500.00	-	Event	0	Collect	<input type="checkbox"/>
John Muir	██████████	One Time	09/04/2019 08:02	MobileCause Fundamentals	BALLOONS99	1250.00	-	Test Pledge	0	Collect	<input type="checkbox"/>
John Muir	██████████	One Time	09/04/2019 07:06	MobileCause Fundamentals	BALLOONS99X	25.00	-	Test Pledge	0	Collect	<input type="checkbox"/>
Scott Couchman	██████████	One Time	08/29/2019 11:33	MobileCause Fundamentals	CFEXAMPLE10	0.00	-	Donor Data Only	0	Collect	<input type="checkbox"/>

From this view, you can click on the name of the constituent to view their Donor Profile.

- **Name**
  - Click on the name of the constituent to view/edit their Donor Profile.
  - The name may be different than the primary contact's actual name.
- **Phone**
  - If the supporter accessed your form from a way other than texting your keyword and then they do not provide their phone number, this field may be blank.
- **Frequency**
  - Indicates whether it is a One Time Donation or a type of [Recurring Donation](#) (Weekly, Monthly, Quarterly, Annually)
- **Date**
- **Campaign**
- **Keyword**
- **Pledged Amount**
  - Used with the Fundraising Thermometer, this will show the amount the supporter has pledged to donate when they text in the KEYWORD AMOUNT NAME, as [described here](#).
- **Collected Amount**
  - Also used with the Fundraising Thermometer and elsewhere, this can indicate if someone pledged one amount, but actually donated a different amount.
- **Status**
  - This indicates the type of "Pledge" or the pledge status. There are several potential statuses, most of which are self-explanatory, such as Collected, Not Collected, Donor Data Only (i.e. non payment activity), etc. See below for more detail on the statuses.
- **Reminders**
  - As described [here](#), this will indicate how many of the three Fulfilment reminders have been sent to this supporter.
  - If the supporter has received all three Reminders and their status is still Not Collected, you might reach out to them another way to see if they will honor their pledge, such as email or calling them directly from the Manage Pledges page.
- **Action**
  - **Collect:** Opens the form to complete the supporter's donation.
    - If the supporter has not fulfilled their pledge, and you call them, from this screen, you can click on Collect to open the form (the Activity) they

pledged to, and with them on the phone, you can enter their information to complete the pledge.

- **Mark as test:** As described [here](#) about the Fundraising Thermometer, you can remove pledges from the Thermometer page. This will also stop the supporter from receiving the Fulfilment reminder texts.
  - The supporter is still able to donate, but it won't show on the Fundraising Thermometer.
- **Action Title Drop Down:** With one or more rows selected, click on the word Action to move those entries to another Activity or another Volunteer Fundraiser in a Crowdfunding and Peer-to-Peer Fundraising activity, as [described here](#).
- **(Select)**
  - Check the Title of the column to select all the rows, or select one or more by clicking the box to add a checkmark so that row can be [moved](#).

## Pledge Status Glossary

To help understand the statuses, we provide the following definitions:

### Common Statuses:

- **Not Collected** - a user has initiated a pledge by texting a keyword, but has not fulfilled it by submitting the form that was linked in their text reply. If enabled these users will receive [fulfillment reminders](#) (available for Fundraising Activities only).
- **Collected** - A successful donation/transaction was made.
- **Donor Data Only** - A form has been submitted, but no payment has been taken (e.g. Fundraiser Sign Up form, Survey, RSVP, free registration etc.). The system creates a "pledge" for all form submissions, regardless of payment being taken.
- **Offline** (*Mail, Website, Event*)- Any of these statuses refer to an Offline Donation that was manually entered or uploaded into the system

### Less Common Statuses:

- **Submitted For Collection** - payment has been attempted but was not successful due to a card decline or other error. The system has recorded their information, but will not attempt another payment unless the user attempts to submit the form again.
- **Voided Transaction** - If a captured transaction was Voided from Existing Reporting > Search Transactions.
- **Test Pledge** - A "Not Collected" pledge that was [marked as a test](#)

## Export Pledged Donation Report

While much of what you need can be found on the displayed results screen, there will be times when you want a full report of your Pledges. This does show different information from the Search Transactions report, as [described here](#), but the majority of it is the same.

Some of the key items you can get in the Pledged Report include:

**Collected at:** Date and Time the donation was collected

**Collections status:** indicates the type of "Pledge" or the pledge status. There are several potential statuses, most of which are self explanatory, such as Collected, Not Collected, Donor Data Only (i.e. non payment activity), etc.

**Message body:** What the supporter actually texted when they used your keyword, so you can see the pledge amount and what they put for their name.

**Pledged amount:** Pulled from the Text message, this is the amount they pledged and what initially appears on the thermometer page. When they complete their donation, the actual donation will be shown on the Thermometer page.

**Pledged Date:** Date and Time they texted their pledge

**Transaction count:** Did they complete a transaction after pledging, and if so how many times

**Transaction details:** This provides the Donation's unique ID, which transaction it is (if there's more than one) and the date and amount collected

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