

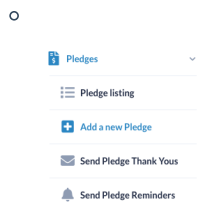
# CRM: Pledges

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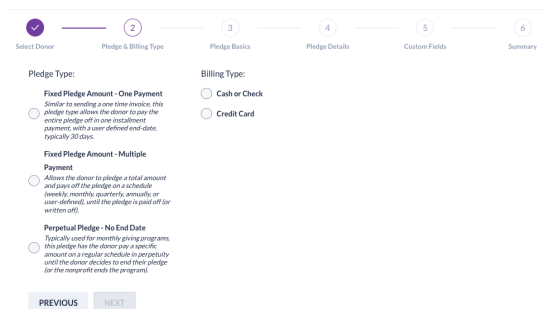
## Add a New Pledge

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**

1 Select Donor | 2 Transaction Type | 3 Gift Basics | 4 Take Payment | 5 Optional Details | 6 Custom Fields | 7 Summary

### Take Payment

#### Select Payment Account

Card Options:

Cora (x1117)

PREVIOUS NEXT

- or add a payment account

**New Transaction for Cedric Diggory**

1 Select Donor | 2 Transaction Type | 3 Gift Basics | 4 Take Payment | 5 Optional Details | 6 Custom Fields | 7 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.