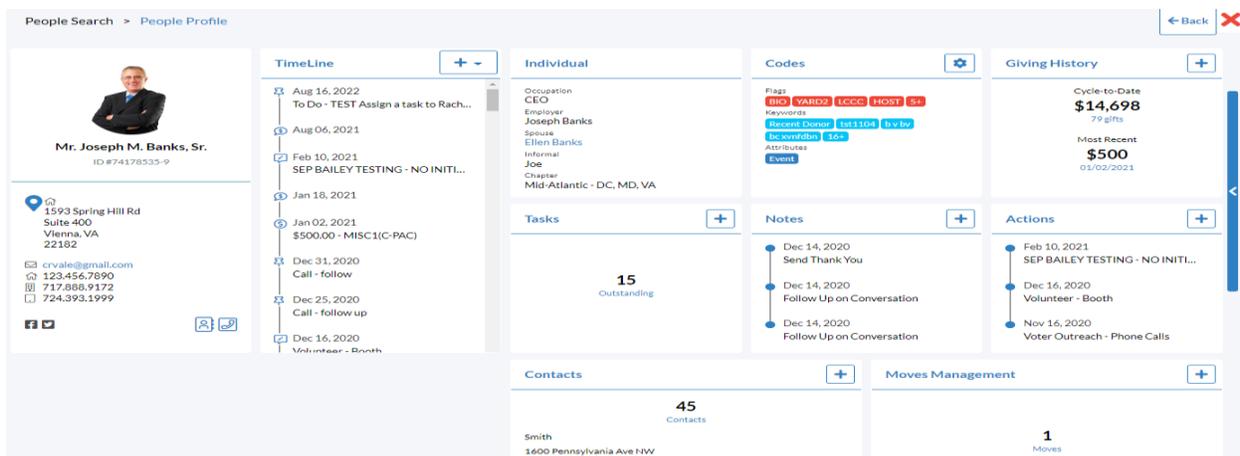


Entering a New Pledge

1. Navigate to the **People Dashboard** and use the **Search** option in the **Navigation Bar** or use the **Quick Search Feature** to find the People record you would like to add a pledge.
2. Click  to open the record within your search results.

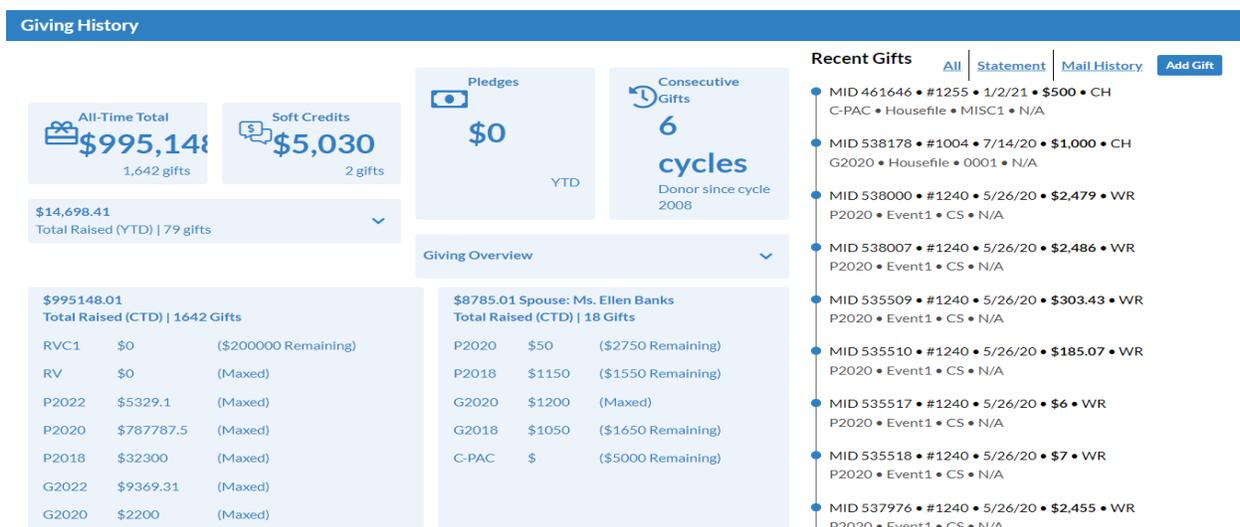
Note: If you are unsure how to use the search option, please see the [Crimson: People Search](#) guide on the HelpDesk.

3. Within a **People** record, pledges are managed under the **Pledge** panel. Once selected, the **Pledge** panel summary will populate.



The screenshot shows the 'People Profile' page for Mr. Joseph M. Banks, Sr. (ID #74178335-9). The page is divided into several sections:

- Profile:** Includes a photo, name, ID, address (1593 Spring Hill Rd, Suite #400, Vienna, VA 22182), email (crvale@gmail.com), and phone numbers (123.456.7890, 717.888.9172, 724.393.1999).
- TimeLine:** A vertical list of events including 'Aug 16, 2022 To Do - TEST Assign a task to Rach...', 'Aug 06, 2021', 'Feb 10, 2021 SEP BAILEY TESTING - NO INITI...', 'Jan 18, 2021', 'Jan 02, 2021 \$500.00 - MISC1(C-PAC)', 'Dec 31, 2020 Call - follow', 'Dec 25, 2020 Call - follow-up', and 'Dec 16, 2020 Volunteer - Booth'.
- Individual:** Lists 'Occupation CEO', 'Employer Joseph Banks', 'Spouse Ellen Banks', 'Informal Job', and 'Chairman Mid-Atlantic - DC, MD, VA'.
- Codes:** Shows flags like 'BIO', 'YARD2', 'LECC', 'HOST', 'SA' and keywords like 'Green Donor', 'H31104', 'h.v.b.', 'bc sw/don', '16-', and 'Event'.
- Giving History:** Displays 'Cycle-to-Date \$14,698 (79 gifts)' and 'Most Recent \$500 (01/02/2021)'. It also lists 'Actions' such as 'Feb 10, 2021 SEP BAILEY TESTING - NO INITI...', 'Dec 16, 2020 Volunteer - Booth', and 'Nov 16, 2020 Voter Outreach - Phone Calls'.
- Tasks:** Shows '15 Outstanding' tasks.
- Notes:** Lists notes like 'Dec 14, 2020 Send Thank You', 'Dec 14, 2020 Follow Up on Conversation', and 'Dec 14, 2020 Follow Up on Conversation'.
- Contacts:** Shows '45 Contacts' with an example: 'Smith, 1600 Pennsylvania Ave NW'.
- Moves Management:** Shows '1 Moves'.



The screenshot shows the 'Giving History' page with the following sections:

- Summary:**
 - All-Time Total: \$995,148 (1,642 gifts)
 - Soft Credits: \$5,030 (2 gifts)
 - Pledges: \$0 YTD
 - Consecutive Gifts: 6 cycles (Donor since cycle 2008)
 - Total Raised (YTD): \$14,698.41 (79 gifts)
- Giving Overview:**

\$995148.01 Total Raised (CTD) 1642 Gifts			\$8785.01 Spouse: Ms. Ellen Banks Total Raised (CTD) 18 Gifts		
RVC1	\$0	(\$200000 Remaining)	P2020	\$50	(\$2750 Remaining)
RV	\$0	(Maxed)	P2018	\$1150	(\$1550 Remaining)
P2022	\$5329.1	(Maxed)	G2020	\$1200	(Maxed)
P2020	\$787787.5	(Maxed)	G2018	\$1050	(\$1650 Remaining)
P2018	\$32300	(Maxed)	C-PAC	\$	(\$5000 Remaining)
G2022	\$9369.31	(Maxed)			
G2020	\$2200	(Maxed)			
- Recent Gifts:**
 - MID 461646 • #1255 • 1/2/21 • \$500 • CH C-PAC • Housefile • MISC1 • N/A
 - MID 538178 • #1004 • 7/14/20 • \$1,000 • CH G2020 • Housefile • 0001 • N/A
 - MID 538000 • #1240 • 5/26/20 • \$2,479 • WR P2020 • Event1 • CS • N/A
 - MID 538007 • #1240 • 5/26/20 • \$2,486 • WR P2020 • Event1 • CS • N/A
 - MID 535509 • #1240 • 5/26/20 • \$303.43 • WR P2020 • Event1 • CS • N/A
 - MID 535510 • #1240 • 5/26/20 • \$185.07 • WR P2020 • Event1 • CS • N/A
 - MID 535517 • #1240 • 5/26/20 • \$6 • WR P2020 • Event1 • CS • N/A
 - MID 535518 • #1240 • 5/26/20 • \$7 • WR P2020 • Event1 • CS • N/A
 - MID 537976 • #1240 • 5/26/20 • \$2,455 • WR P2020 • Event1 • CS • N/A

4. Click  to create a new pledge. A new pledge window will appear.
 - To view a recent pledge, click on a listed pledge from the right side of the window.
 - To see all the pledges, click **All** in the right-hand corner.

- Click  to open an existing pledge to make any updates or  to delete a pledge.
5. The only required fields when creating a pledge are **Amount**, **Date** and **Fund Code**. However, if you also include the expected **Source Code** and **Fund Code**, then the gift will auto-reconcile when a matching gift is entered in Crimson. Without a source code to match the gift to the pledge, you will need to manually apply the gift to its appropriate pledge. Fields to complete include:
- **Pledge Amount:** Enter the amount of the pledge in this
 - **Pledge Date:** Will automatically be filled with the current date, but a different date can either be entered or you can click the calendar icon to choose the date from a pop-up calendar.
 - **Expect Date:** Enter the date when the pledge is expected to be fulfilled in this field or click the calendar icon to choose from a calendar.
 - **Fund Code:** Choose the fund code for the pledge from the drop-down menu.
 - **Source Code:** Choose the source code for the pledge from the drop-down menu.
 - **Club:** You can attribute a pledge to a specific existing club.
 - **Comment:** Enter any additional information/note about the pledge in this field.
 - **Received In-House:** If the pledge has been received, but has not yet been entered in Crimson, you can use the **Received In-House** area to note that it has been fulfilled.

Enter the date of reception in the **Date** field or click the calendar icon to select the date from a calendar, and the gift amount in the **Amount** field. The pledge will still appear if you search for unfulfilled pledges, but the received in-house information will be visible in that search to avoid confusion about the status of the pledge.

- **Tracking:** To give credit for the pledge to a fundraiser, enter that fundraiser's tracking number in the **Track#** field within the **Tracking** area and enter the amount of credit to be given in the **Amount** field. Under the **Balance** section, you can see what amount is remaining after a payment with the same tracking # has been linked to this pledge.

Note: Be sure to always click  after you have entered or edited any information for a pledge.

Applying Payments to a Pledge

Gifts that match an existing pledge in source code fund code will automatically be applied to that pledge, fulfilling it. Gifts not marked with the same coding information or not matching in amount must be manually applied or linked.

1. To apply one or more gifts to a pledge, open that pledge and go into the **Link Payment** section.

Payments		Link Payment				
	Txn#	Date	Amount	Fund	Source	Track#
	461646	1/2/21	\$500	C-PAC	MISC1	3011
	535509	5/26/20	\$303.43	P2020	CS	
	535510	5/26/20	\$185.07	P2020	CS	
	535517	5/26/20	\$6	P2020	CS	
	535518	5/26/20	\$7	P2020	CS	
	535525	5/26/20	\$14	P2020	CS	
	535533	5/26/20	\$22	P2020	CS	
	535534	5/26/20	\$23	P2020	CS	
	535541	5/26/20	\$30	P2020	CS	
	535548	5/26/20	\$2	P2020	CS	

Cancel Save

- Under the **Link Payment** section, a list of existing gifts for that donor will appear. Click the  button to the left of the gift that you are linking to the pledge.
- A confirmation message will appear asking, **“Are you sure to add Payment?”** Click **Yes**.

- Click the  button to the left of a linked payment in the **Payments** section to remove it from the pledge. A confirmation message will appear asking, **“Are you sure to delete Payment?”** Click **Yes**.

Running Pledge Reports

There are several pledges reports available under All or Income Reports. **#264 – Paid Pledge Report** and **#281 - Outstanding Pledges Report** are both helpful reports to run when managing pledges.

- Click on the **Show More** icon under **Income Reports List** on the **Fundraising Dashboard**.
- Search for the **Paid Pledge Report** by entering some of the report’s name or report number in the **Quick Search** tool

Fundraising Reports		...
1	Multi Count #210	
2	Deposit Summary by Program #286	
3	Package Receipts by Date Rep... #400	
4	Thank You Status Report #231	
5	Source Code Detail By Package... #234	

3. Click  to open the **Run Report** window.
4. Complete the prompts that appear for the report.
5. Click  to view results on the screen.
6. To open/save the list as an Excel file, click . You have the option to open with Microsoft Office Excel or save the file to your computer.
7. Click the  **Results** toggle button at the top right of the results if you want to reset the search filters and re-run the report with different criteria.