Pledges: How to Add a New Pledge

Speech	Cursor Actions
Perhaps someone has promised to donate $1000 to your organization this year, but they're not quite sure when they'll make that donation, or if they will make several smaller donations that total $1000 instead. Or perhaps you need to manage multiple monthly donors. To manage these promises in your Sumac database, use the Pledges add-on.	Show image outlining the different pledge examples.
In your Sumac console, expand Fundraising, and choose Pledges.	Show console. Expand Fundraising, choose Pledges.
Click New to open a new pledge record.	Click New.
Select the contact who is making this pledge.	Click contact icon. Select Lauren Bailey.
The Commitment Date for this pledge is set to today\s date, but you can change it by clicking this calendar button, or by typing in a different date.	Point to Calendar Icon next to Commitment Date. Type "March 1, 2014"
Choose the Pledge Status.	Choose Pledge Status: Active
Frequency (months) defines the number of months between payments. Zero means a one-time payment, or that you do not know how often the donor will be making donations toward this pledge. However, if this is for a monthly donor, enter "1" which tells Sumac that one donation will be made toward this pledge every month.	Enter "1"
Enter the day of the month that this donor plans to make donations toward this pledge. For example, if Lauren Bailey plans to donate on the first of every month, we would enter a "1" here.	Enter "1"
Enter the first payment date for this pledge. For this example, we'll specify that they first payment date was March 1, 2014.	Choose First Payment Date: March 1, 2014
You can also specify the last payment date for this pledge. For example, perhaps Lauren Bailey has promised to donate once a month for one year. In that case, the last payment date would be February 1, 2015.	Choose Last Payment Date: Febrary 1, 2015
In this database, the Last Payment Date field is mandatory. However, if your donors make open-ended pledes, this field can be made optional by your Sumac administrator.	Point to Last Payment Date field.
Specify the recurring payment amount for this pledge. Perhaps Lauren Bailey has pledged $50 a month. In that case, enter $50 here.	Enter "50"

Alternatively, if this pledge is not for a monthly donor, but instead is tracking the total amount that the donor plans to give, choose "Irregular Payments" and enter the total amount that will be donated.	Put a check next to "Irregular Payments" Point to Total Amount field name. Enter $1000
But for this example, we'll say that Lauren is donating $50 a month.	Remove check next to "Irregular Payments" Enter "50"
Information in the pledge record is used to automatically create donation records, as the monthly donations occur. So you must define donation record details and payment details so that Sumac can create the donation and payment records for you.	Point to "Donation record details" Point to "Payment details"
Choose a Donation Type that should be used for donations from this pledge.	Open Donation Type drop-down menu.
Many Sumac users tend to use a Donation Type like "Pledge" or "Monthly Pledge" for this reason.	Choose "Monthly Pledge"
You could also enter applicable Event, Campaign, Fund or Account details.	Point to Fields. Choose Account "Individual"
Click the Payment button to enter payment details for this pledge.	Click Payment button.
Choose the appropriate payment type.	Choose Visa
If this is a monthly donor, and they've requested that you take these payment off their credit card each month, you can enter their credit card details here.	Enter CC Number: 4111111111111111 Enter CC Expiry Month: 05 Enter CC Expirty Year: 2017 Enter Verification Value: 456 Enter CC Name: Lauren Bailey
Click OK to save the payment details,	Click OK
then click OK to save the pledge,	Click OK
Sumac asks you to confirm the number of donations and total amount for this pledge.	Point to confirmation message.
Click Yes, and Sumac saves the pledge into your database.	Click Yes
Check out more training videos to learn more about managing Pledges using Sumac.	