

Pledges: How to Process Pledges

<i>Speech</i>	<i>Cursor Actions</i>
In your Sumac console, expand Fundraising, and choose Pledges.	Show console. Expand Fundraising, choose Pledges.
Search to find the pledges that you want to process.	Open Search Type drop-down menu
You might do this by searching for payments that span this date, or by searching to find all the pledges that are due this month.	Point to both options.
I want to draw your attention to these three search criteria that are preceded by three asterisks.	Point to the “***” search criteria
These criteria represent searches that must be done monthly and followed up with an appropriate action.	
“***Due this month” finds pledges that have payments due in the current month. This search is normally done at the beginning or middle of each month, when preparing to process those pledges.	Choose “***Due this month” Point to searching area
“***Last Payment Soon” finds pledges whose last payment date is approaching. This search helps you identify pledges that are going to expire soon. You should call these donors and ask them to renew their pledges.	Choose “***Last Payment Soon” Point to searching area
“***Credit Card Expires Soon” finds pledges whose credit card details specify that they card number will expire soon. This search helps you identify those pledges so that you can contact the donors in advance and update their credit card details.	Choose “***Credit Card Expires Soon” Point to searching area
This training video is about <i>processing</i> pledges, so we'll find all the pledges due this month.	Choose “***Due this month”
Usually, you want to find only pledges that have <i>not</i> already been processed this month.	Put a check mark next to “Not processed this month”
Click Search,	Click search
And Sumac finds all the pledges due this month that have not already been processed.	Point to list.
To ensure that you're only processing pledges that have payments due today, sort this list by the “Day of Month” column.	Sort by “Day of Month”
This also shows what other days this month have pledge payments due.	Point to “Day of Month” column
Select all the pledges that have payments due today.	Select all the “1” pledges.
Expand Special Editing, and click Process Pledges	Expand Special Editing, Click Process Pledges.
Click to indicate that you want to process only the selected pledges.	Click OK

Choose the date that Sumac should use for the donation and payment records.	Choose February 1, 2016
Sumac presents a new window that confirms what it is about to do when processing these pledges. It will: <ul style="list-style-type: none"> • Create donation records • Create payment records • and will automatically process the payments 	Point to each option as it is read out.
Click OK, and Sumac will proceed to process all the selected pledges.	Click OK
Once done, Sumac presents a summary window that confirms what has occurred for each pledge you processed. This window lists: <ul style="list-style-type: none"> • the donor's names • the payment type used • and confirms that the payment was recorded • the donation was recorded • and finally that the payment was processed successfully 	Point to summary window Point to each item as it is read out.
Notice that in the "Payment Processed" column, Sumac has a "Yes" indicated for each of these pledges. This means that the payments for all of these pledges were processed successfully!	Point to Payment Processed column with "Yes" results
However, if any of these payments <i>were not</i> processed successfully, Sumac will say "NO" in this column, and will include the error message it receives from your payment processor. If this occurs, you should review the error message to determine why the payment was not processed, make the necessary corrections, and try processing that payment again.	
Since all of these payments were successfully processed, we can close this window now.	Click Close
If you want to see the donations that are linked to any of these pledges, just select the pledge you're interested in,	Select a pledge
Then click the Show Donations button,	Click Show Donations
to see the donations you've received, <i>and</i> the donations you are expected to receive towards this pledge.	Point to list of donations.
<i>Check out more training videos to learn more about managing Pledges using Sumac.</i>	