Adding Pledges

A pledge is an amount a contributor promises to give to a particular fund. Pledges are recorded in ACS based on date range, fund, amount, and frequency.

You can add a pledge for a contributor at any time, and a contributor may have multiple pledges for multiple frequencies, as long as they are for different funds. For example, a contributor may have a pledge to the General Fund for six months, and a pledge to the Building Fund for three years. You can also add a pledge on the fly when entering contributions.

To add a pledge, you must have security rights to Add/Edit Pledges.

To add a pledge

1. Under Manage Records, click the Contributions tab.
2. In the drop-down list, select Add/Edit Pledges and click Go.
3. To find your contributor, click Find Person or Find Org.
4. Select the contributor's name, then click OK. Once selected, the contributor's current pledges and pledge history display.
5. Click Add.
6. If applicable, select the pledge's Entry Date. This defaults to the current date.
7. Select the pledge's Fund, Start Date, Stop Date, and Frequency.
8. Enter the pledge's Amount per period and Additional Amount (if applicable). ACS calculates the pledge's Total, but you can edit this field if you need to.
9. If applicable, select the Giving Plan.

Tip

Individuals who have pledged with an undecided amount and frequency can be entered into the database with a frequency of As Can and an amount of $0.00.

10. OPTIONAL: To add additional pledges for this individual, select Add Another.
11. Click OK.

Tip

If a pledge begins in the middle of the year, you can choose whether or not to apply gifts from the beginning of the year to it. By default, gifts from the beginning of the year for that fund will be applied to the pledge. To avoid this, select Only Apply Gifts from Start Date on the Configuration tab in Contributions Setup. If gifts are already attached to the pledge that should not be, you can remove them.

Additional Field Information
**Entry Date**
The date a pledge was entered or the date the pledge was received.

**Fund**
Click **Lookup** to select the fund the pledge is for.

**Start Date and Stop Date**
Enter or select the pledge's date range. The pledge can span any length of time, from a few months to multiple years.

**Frequency**
Select how often pledge amounts are due.

- **As Can** — Due the last day of the pledge.
- **Bi-Weekly** — Due every two weeks.
- **Monthly** — Due each month.
- **One Time** — Due immediately (at the start of the pledge).
- **Quarterly** — Due every three months.
- **Semi-Annual** — Due every six months.
- **Semi-Monthly** — Due twice a month.
- **Weekly** — Due each week.
- **Yearly** — Due at the end of the year.

**Amount**
Enter the amount to be paid each period. For example, if the pledge is a one year pledge of $520.00 with a weekly frequency, enter $10.00.

**Additional Amount**
Enter the pledge's additional amount, if applicable. For example, a contributor pledges to give $1000 this year to the Budget Fund, but decides to start off the pledge with an additional amount of $100. This will bring the total pledge amount to $1100. You will need to enter and post the additional gift in contributions in order for it to reduce the pledge balance.

**Total**
This field displays the total pledge amount, including the Additional Amount.

**Giving Plan**
If the pledge is a part of a giving plan, select it here. You must have giving plans enabled in Contributions Setup.

**Auto Post Arrears**
This option only displays if Auto Post Arrears is selected in Contributions Setup. Select this option to automatically apply gifts to this pledge after it ends if it is not paid in full by the stop date.

**Forgiven**
Select to mark an unpaid or arrears pledge as forgiven. An example could be if an individual is moving away and is unable to continue making payments towards their pledge.

**Status**
Displays the pledge's status.

- **Arrears** - The pledge has ended and it is not paid in full.
- **Forgiven** - The pledge was marked as forgiven. Only pledges with a status of Unpaid or Arrears can be marked Forgiven. An example could be an individual who moved away and is unable to continue making payments towards their pledge.
- **Over Paid** - The pledge is paid in full and additional payments have been made to the pledge. For these pledges, Over Paid displays as the status on the Edit Pledge window, but Paid displays on the Add/Edit Pledges window. In order to overpay a pledge, the option to Overpay Current Pledges must be selected in Contributions Setup.
- **Paid** - The pledge is paid in full.
- **Unpaid** - The pledge is still ongoing, but is not paid in full.
Add Another
Select to continue adding pledges for the selected individual.