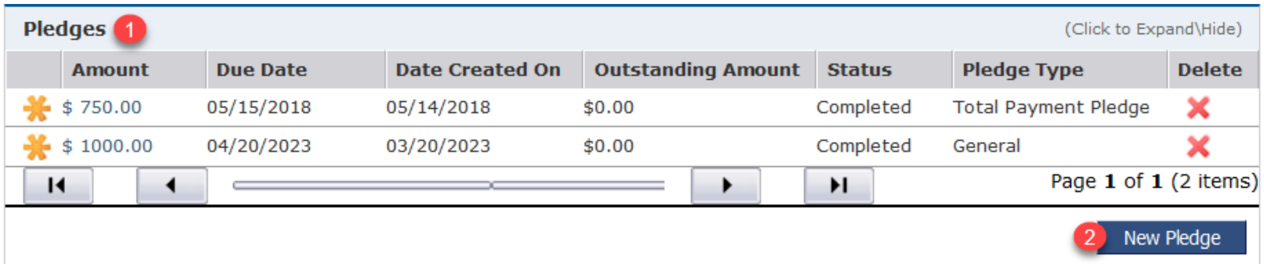
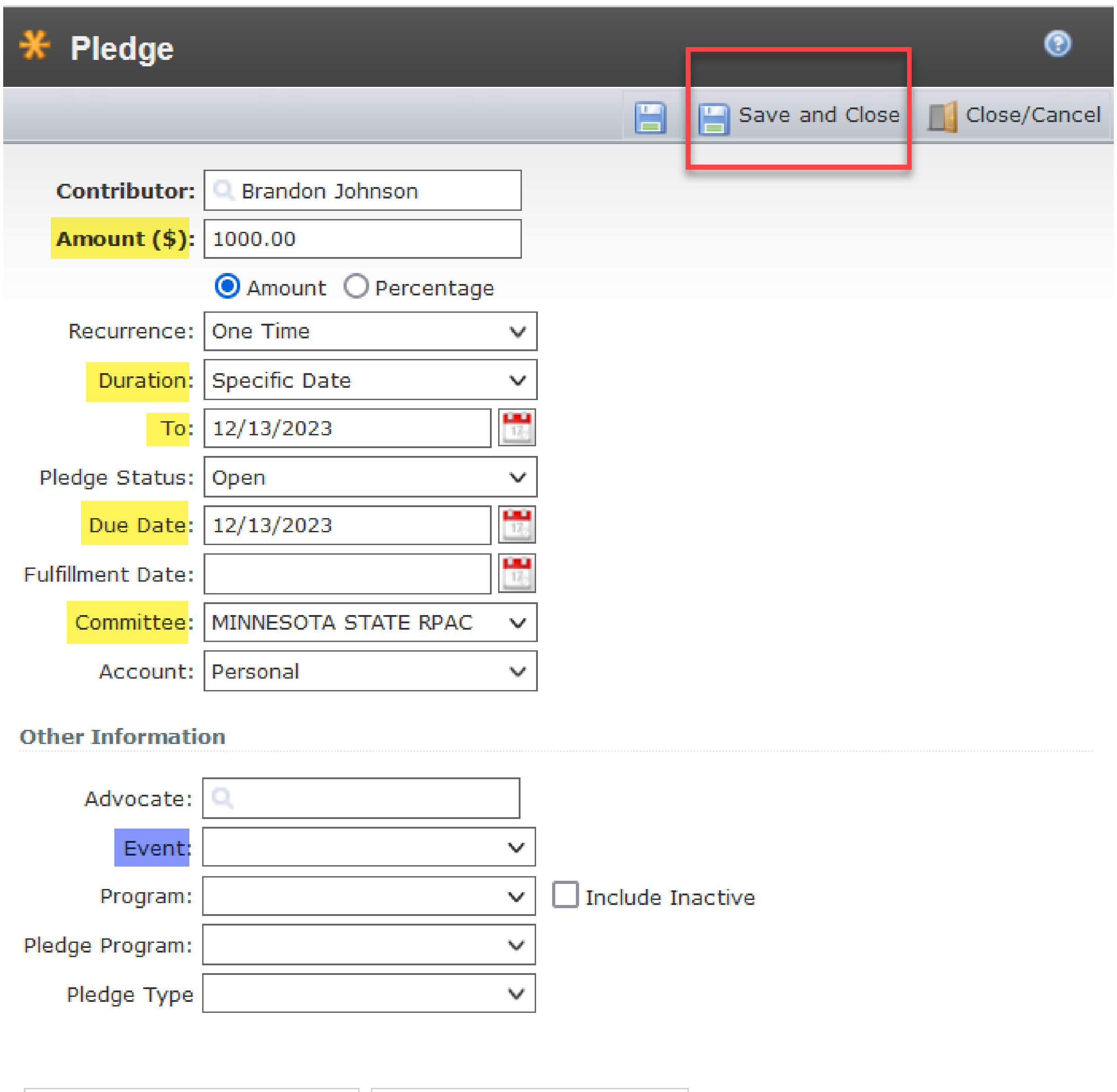
ENTERING PLEDGES

Entering a Pledge

To Enter a Pledge, start by expanding the Pledges Panel in the Individual's Record. Then click New Pledge. A Pledge window will pop up for you to enter the pledge.





On the Pledge window, type the total amount the member intends to contribute for the recognition year. For example, if the member intends to be a Sterling R investor, but already has $500 invested for the recognition year, you would still create the pledge for the total of $1,000.

For Duration, choose Specific Date, then enter a date in the To box that corresponds with the end of your RPAC year or collection period.

Next, enter the Due Date as the same date you used above in the To date.

Then, select your filing committee. The Account doesn't matter for the purpose of the pledge.

Please note, if you would like to tie the pledge to a specific event, you can do so by using the Event dropdown under Other Information. This field is not required and completely optional.

When you have entered the required information, click Save and Close.

The pledge will now appear in the Pledges Panel. Any previous investments for the recognition year will link with the pledge in a process that is run nightly and the Outstanding amount displayed will recalculate.