

Processing Pledge Reminders

In DonorPerfect Online (DPO), a user has two options for processing pledge reminders. They can use the Pledge Processing feature in DPO or simply create a custom report to export the data needed to prepare pledge reminders. Both options are discussed in this document.

Pledge Processing

The pledge processing feature in DPO allows a user to create a .csv file that can be used in a Mail merge in Word. It also calculates a Delinquent Amount field, which – when run consistently – will include the total amount past due for each donor. Finally, pledge processing in DPO will maintain the date it was run for each record affected; the LAST_BILL_DATE field maintains this information.

Pledge Processing screen in DPO

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Mailmerge E-Mail **Pledge Processing** Mailmerge Templates Export Templates

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Pledge Processing

Pledge Processing Options

Billing Frequency Type: Semi-Monthly, Monthly and above

Last Reminder Sent: 08/2005

Download reminders for pledges due (mm/yyyy): 09/2005

For semi-monthly pledges, check for due dates up to: second half of month (16th-31st)

Set Selection Filter...

Update delinquent amounts?

Include pledges where reminder is not checked?

Include "NO MAIL" Addresses

? [How is an address selected for a donor?](#)

OK

To start this process in DPO, go to **Mailings → Pledge Processing**. The resulting Pledge Processing screen allows you to refine the pledges you would like to process. For example, you can set up a selection filter just like for any report in DPO. You can also specify the month in which pledges due are included in the process. You can also decide whether to include donors who are set not to receive mail in the system. In addition, you can decide whether to process those pledges where the “Reminder?” checkbox was deselected in the Pledge screen. When you are ready to process the pledges, select the **OK** button. DPO will list the number of people for whom pledges were processed as well as the total amount pledged that is due. A CSV file is then created which you can use to complete your mail merge in Word.

Note that the Delinquent Amount is recalculated each time you run Pledge Processing. If Pledge Processing is run consistently at the appropriate monthly

intervals, this amount will correctly reflect the total amount delinquent for a particular pledge. Please contact DPO support to ensure you are running your Pledge Processing at the appropriate intervals. You can always use the Bill_Amt field to report on the amount due for the most recent payment. Note that this field does not take into account previous past due pledges; only Delinquent Amount will capture that information.

Pledge Processing - Scenarios

The following details are taken from DPO Help. This information gives additional scenarios about how Pledge Processing calculations work in DPO:

When Pledge Reminders are generated, the Delinquent Amount on the pledge reflects the amount billed in the reminder process. When a Pledge Payment is made, both the balance and delinquent amount decrease accordingly. If a donor makes a payment during a period for which pledge reminders have not been run, the delinquent amount will be a negative number. This is accurate because they have pre-paid and should be credited that amount.

Each time pledge reminders are run and the delinquent amounts updated, the delinquent amount is increased by the Amount to Bill entered during Pledge setup. The following is an example of how pledge amounts are calculated:

Total Pledge 400.00
 Amount to Bill 100.00
 Start Date 06/01/06
 Frequency Quarterly

In this case, the donor will be billed four times at \$100 a quarter, with the first pledge reminder sent out on 6/06. The **Balance Due** and **Delinquent Amount** will be calculated as follows:

Pledge Transactions	Balance Due	Delinquent Amount
Pledge entered in system	400.00	0.00
Pledge reminder sent 6/06	400.00	100.00
Payment made 7/06	300.00	0.00
Pledge reminder sent 9/06	300.00	100.00
Payment made 9/06	200.00	0.00
Early payment 11/06	100.00	-100.00
Pledge reminder sent 12/06	100.00	0.00
Payment made 12/06	0.00	0.00

Pledge Processing – What to Look For

If your Pledge Processing is not working correctly, some things to check include:

- 1) If you have any pledges that utilize an Unusual Payment Schedule, make sure that the full amount of the pledge is accounted for in the various

payments. If not, the Pledge Processing will not accurately project how much money has been pledged but not paid by the donor. For example, one camp enters a pledge of \$10,000. The payments are listed as being planned for \$2500 on 12/1/08, \$2500 on 5/31/09, and \$2500 on 12/1/09. The outstanding \$2500 is not listed in the payment schedule at all. To fix, simply add the final expected payment of \$2500 to match the total \$10,000 pledge.

- 2) For pledges that utilize an Unusual Payment Schedule, the Billing Amount field must remain at \$0. The Billing Amount should be calculated from the Unusual Payment Schedule itself. If the Billing Amount field is an actual dollar value, Pledge Processing may not produce accurate results for that pledge.

Sending Pledge Reminders without using Pledge Processing in DPO (Using Custom Reports Instead)

If you do not expect to run your Pledge Reminders on a consistent schedule or have no need to track Last_Bill_Date and Delinquent Amount, you can simply create a custom report to export all outstanding pledges to a .csv file and create a mail merge from that file.

Remember, with this method, the date billed will not be captured in the system. Also, delinquent amounts will never be calculated in the system.

Finally, ALL outstanding pledges will result, so you will have to manually determine which pledges require a reminder each time. You can do this by creating a specific Selection Filter to refine the pledges that will result from your Custom Report. See below for some specific requirements for this Selection Filter.

If you decide to create your pledge reminders in this way, here is how it works:

- Go to Reports → Custom Report Writer in DPO
- Select Create New Report
- Add the following fields to the report:
 - **Donor_ID**
 - Contact information for mailing/email such as **First Name, Last Name, Address fields, Email Address, Home Phone Number**, etc.
 - **Gift_ID**
 - **Bill_Amt** (the amount of each pledge payment due (i.e., not the total Pledged, just the amount due at the next payment due date))
 - **Frequency** (frequency of payments: M = Monthly; Q=Quarterly; A=Annual; etc.)
 - **Gift_Date** (Date the Pledge was entered in DPO)
 - **Last_Contrib_Date** (Last date that donor gave an actual gift (not just a pledge))

- **Last_Paid_Date** (Last date that donor gave an actual gift that was applied to the pledge)
- **Start_Date** (Start date of pledge (when first payment is due); this is entered on Pledge screen)
- **Total** (Total amount pledged)
- **Record_Type** (P = Pledge (G = Gift, but you won't see these on this report because of our Selection Filter))
- *If there are any other fields you would like to include in your Pledge Reminders, add them here as well.

To run the report:

- Create a Selection Filter where Record Type = P. Call it Pledges Only. This will remove gifts from the report and only show pledges that have been entered in the system.
- Select the checkbox called "Include Pledges (No Pledge Payments)". Otherwise, this report won't show any details.
- Use the far right excel icon to run the report as a .csv file. This file can be used in a Mail Merge in Word.