Donations Cheat Sheet

Pledged Donations

A pledged donation is when a patron says they are going to give the company X number of dollars over a period of time. A patron may pledge \$600, pay \$50 immediately and say they will pay \$50 a month so there total for the year is \$600. Also they may pledge \$600 and ask you to post date the payments to be made once a month on there credit card or postdated cheques. Theatre Manager deals with these types of donations within the Donation Detail window which is opened when a new donation is being made or edited. **Pledges without Post Dated**

Ticket •Donation Play Mail List Pass/G.C. Relation • • Order # Prog Yr Use Campaign Nami 78 2010 Donation (gift) Corporate Spon • Im RED = patron has not applied full payment to a donation • New Open Delete Payment	 Click the Donation •Donation tab. Click the New • New button.
Donation Detail for Dick Dunsten (Patron #72) (inserting) Whep Dick Dunsten (Patron #72) (inserting) Details Notes Pledge Schedule/Contacts Receipts Soft Credits Matching Gift Trans Campaign Annual Individual 3 Non-F Date Donated Sep 27 2010 3 Non-F Next Solicitor 13 Date Donated Sep 27 2010 3 Non-F Next Solicitor 13 Date Donated Sep 27 2010 3 Non-F Next Donation (gift) 10000 co itsy Sponsor Total Payments 50.00 Matching Gift Credits Matching Cift Credits Matching Sep 2000 This indow helps you set up the pledge reminders. These will be sent to the donor at some time in the future to ask them to pay for their pledges. These will be sent to the donor at some time in the fifthe date that the payment for the donation is due. Correspondence Letter 5 Recent Donation Send Reminder as Letter Pledge Amount and Dates New Reminders 9 none exist Send Reminder 10 drys in advance Date First Pledge Due Oct 27 2010 1 New Setty Monthly Quarterly North New Reminders 9 none exist Send Reminder 10 drys in advance Det 17 2010, Nov 17 2010, Det 17 2011, Mer 17 2011, Apr 17 2011, May 17 2011, Jun 17 2011	 Enter the Donation Details: 3. Campaign 4. The amount. 5. Click Save, then click the tab. 6. Click the Add Pledge Add Pledge button. The Donation Pledge Reminder Setup window will open. 7. Click the Letter Search button. The Form Letter Selection window will open. Select a Form Letter. Single click on a letter to select it. 8. Click the Select Select button. 9. Alter the remaining values as required. 10. Click the Add Select Add Select button.
Donation #29 Detail for Dick Dunsten (Patron #72) Holp New Sove Details Now Sove Details New Sove Sove Sove Sove Sove New DUNSTENDICK!!!! Sove Sove Sove Sove Sove Sove Sove New DUNSTENDICK!!!!! Sove Sove Sove Sove	 11. Click the details tab. Click the Payment Payment button. The payment for order window opens. 12. Change the Payment Amount to reflect the amount the patron will pay at the time the donation is created. 13. Click the Accept Payment Accept Payment button. 14. Place the remaining amount of the pledge On Account. As they pay more of there pledged amount additional payments will be made to the order.