

Semi-Annual Pledge Review

NCSU Advancement Services Office

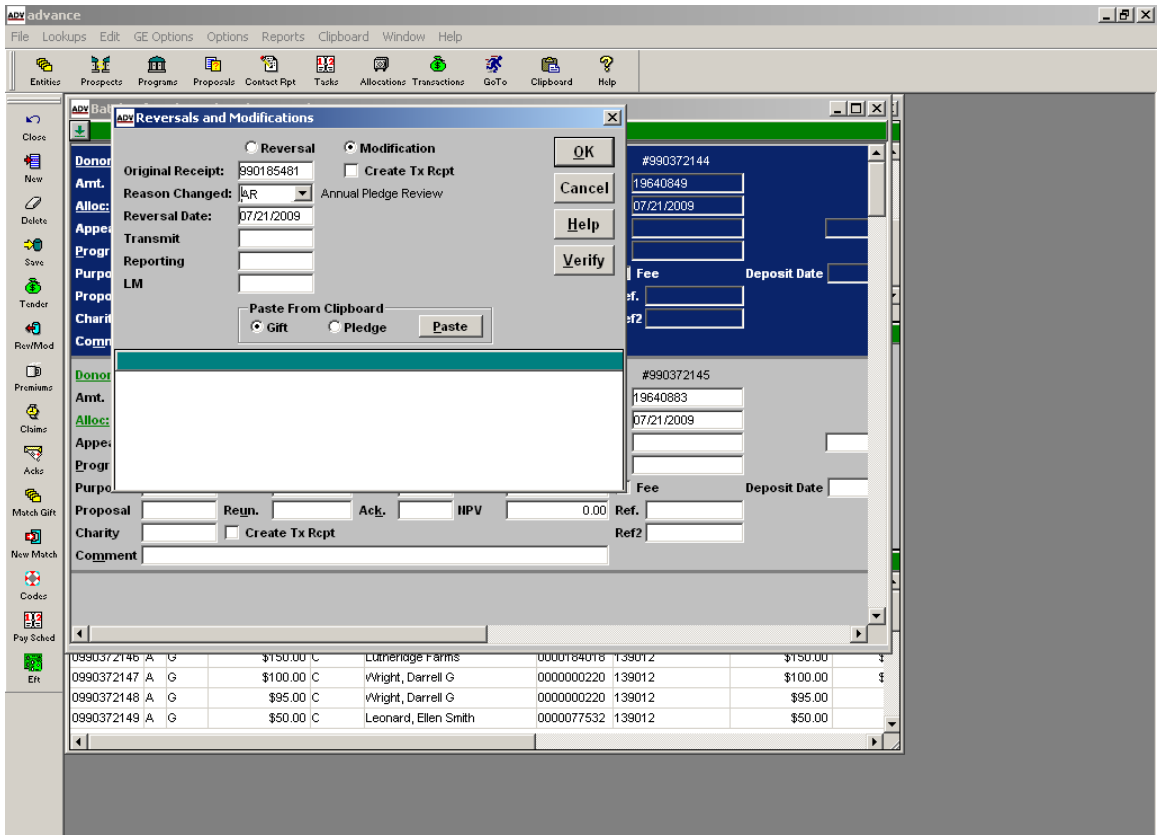
Policies and Procedures

Appendix A

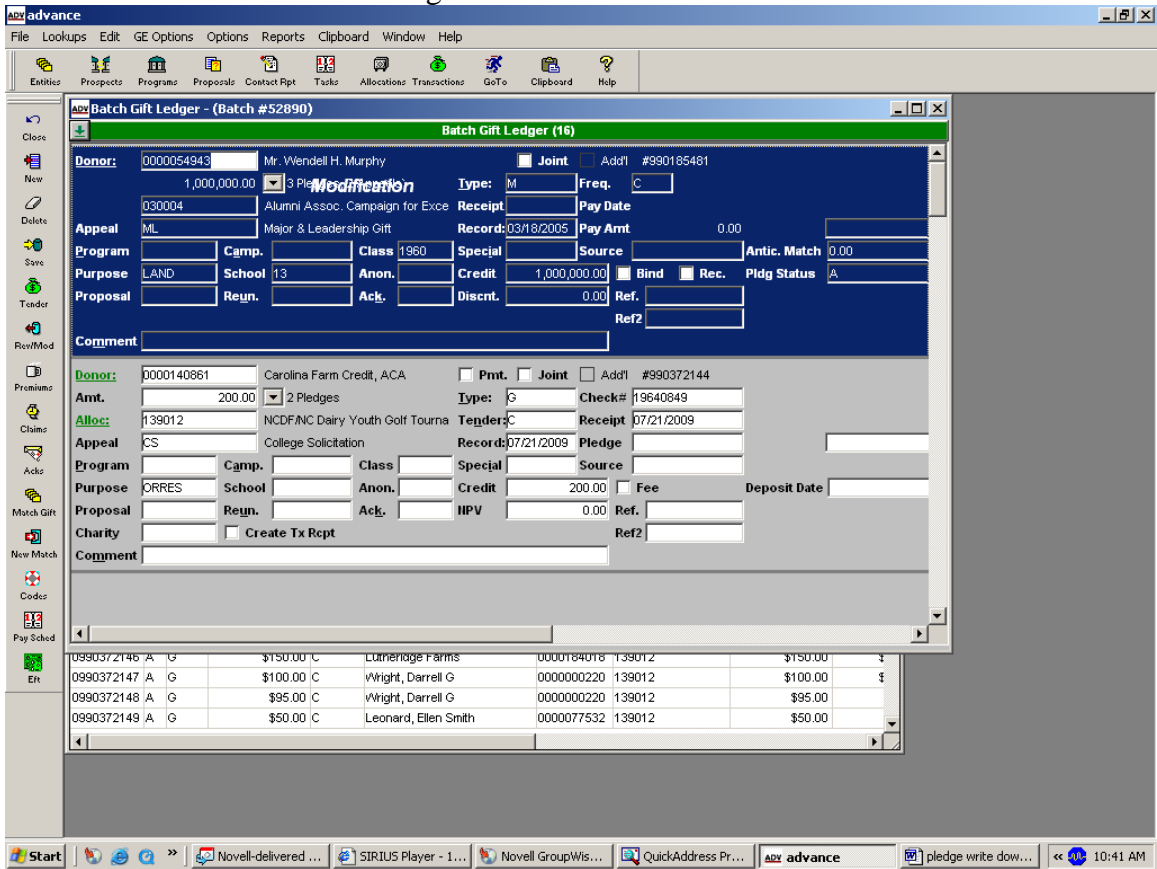
July, 2009

- Pledge Write-off Procedures
 - This will apply to multi-year pledges only; annual giving pledges will not be affected due to the nature of those pledges, and Advance's inability to accept zero balances in the paid field.
 - The pledge write-offs will now occur in a batch.
 - The reason for this change is to show the actual amount of credit for the donor after a pledge has been marked paid or written off, while still retaining the original amount of the pledge. Previously, the total amount of the pledge was credited to the donor, no matter how much of the pledge had been actually paid.
 - Written-off/down pledges and back-up will be filed in the appropriate foundation pledge file. The back-up should include all related written correspondence, as well as a screen print with an explanation stapled to the back-up to act as a cover sheet.

- Steps and changes within the batch
 - Go into a batch (there is no need to begin a new batch for this process, a current gift batch is sufficient.)
 - Click the reverse/modify pledge option, enter the pledge#, and select the specific reason for the change.

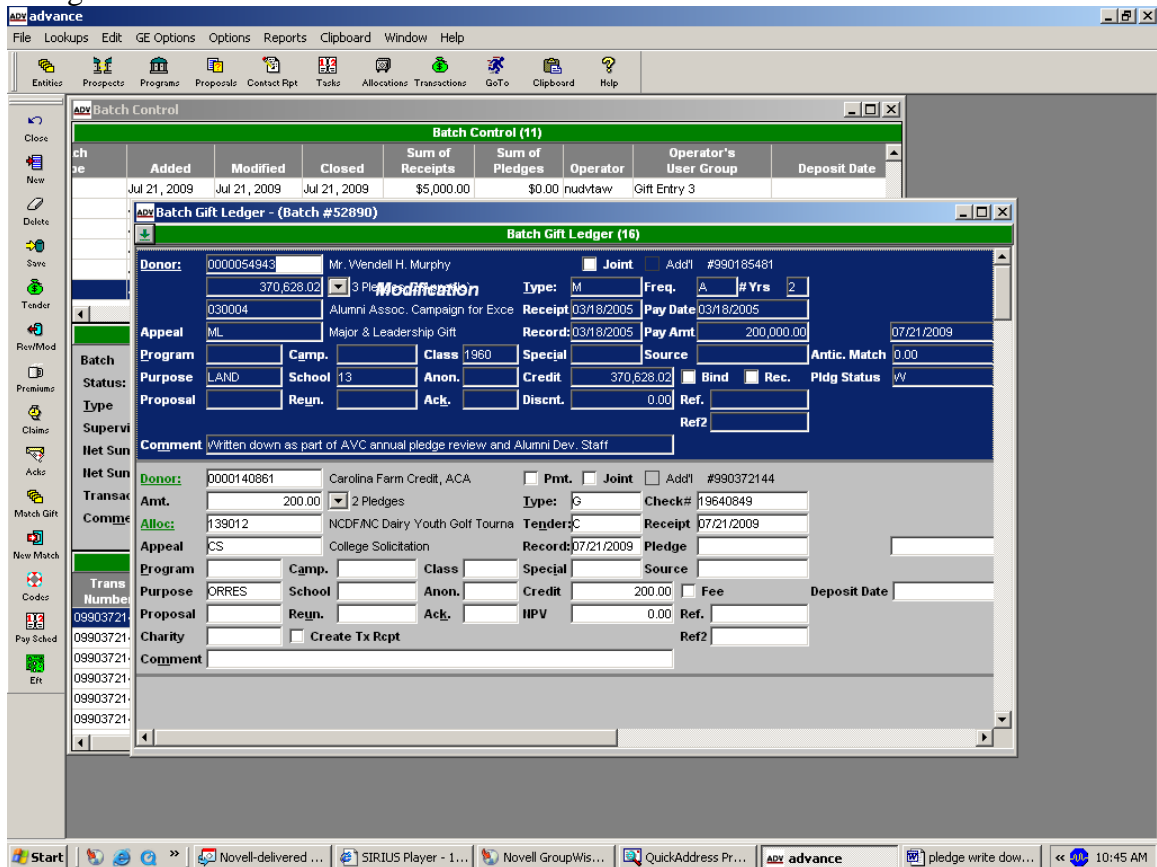


- Start
- Click OK and enter the batch ledger screen.



- Start

- The example above reflects a pledge to be modified. Below is the same pledge after the changes have been made.



- In the above example, the pledge has been written down to equal the amount the donor paid on the pledge. The PLDG STATUS has been changed to W for written off, and an explanation added to the comment field. Because this was a custom pledge, the frequency had to be changed in order to make the other changes to the pledge.
- If the pledge was to be marked “paid,” the same steps will remain except that you exchange the W for a P in the pledge status field.
- Once this is completed and checked, the batch can be closed with the appropriate negative amount in the pledge field for processing.