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Overview

This article will teach you how to setup a new **pledge** (which can be a **single** or **recurring** payment pledge) in a donor's record. Then it walks through the steps to **apply payments** (donations) to **open pledges** from the **Contributions** list.

The article also touches on how to **search** for donors who have **unpaid pledges**, and view **detailed pledge reports** in the **Pledge Details list**.

 **Tip:** Prefer **video**? This short [video tutorial](#) shows how to **apply payments** (donations) to **open pledges**.

Outline

#1 Create a New Pledge in a Donor's Record Card

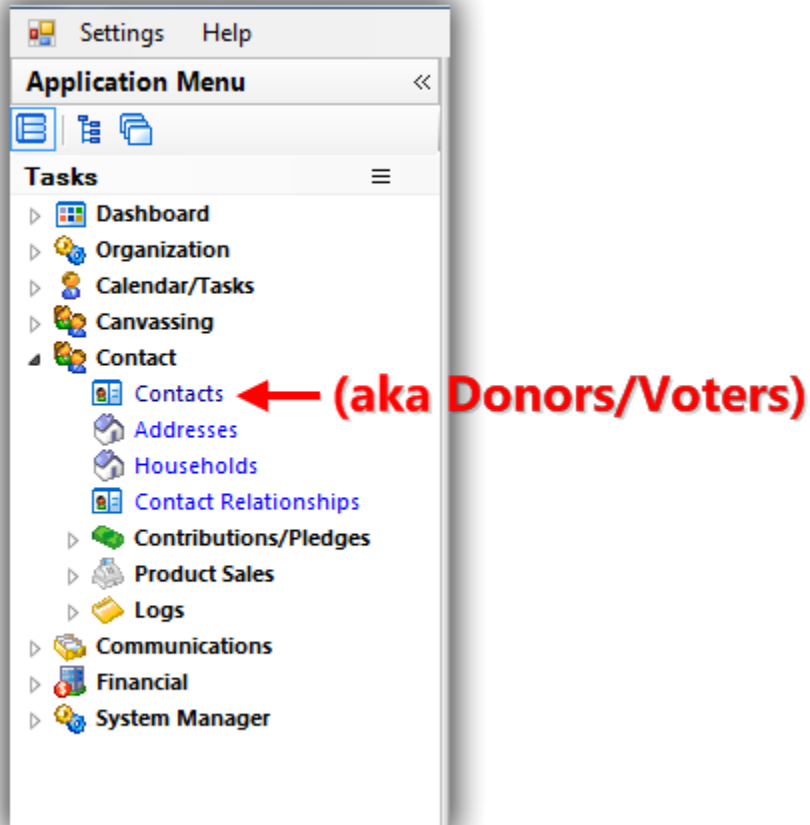
#2 Applying Donations to Open Pledges from the 'Contributions List' (Single Apply & Mass Apply)

#3 Running Reports for Donors with Unpaid Pledges, and Pledge Detail Reports

#4 Related Resources

#1 – Create a New Pledge in a Donor's Record Card

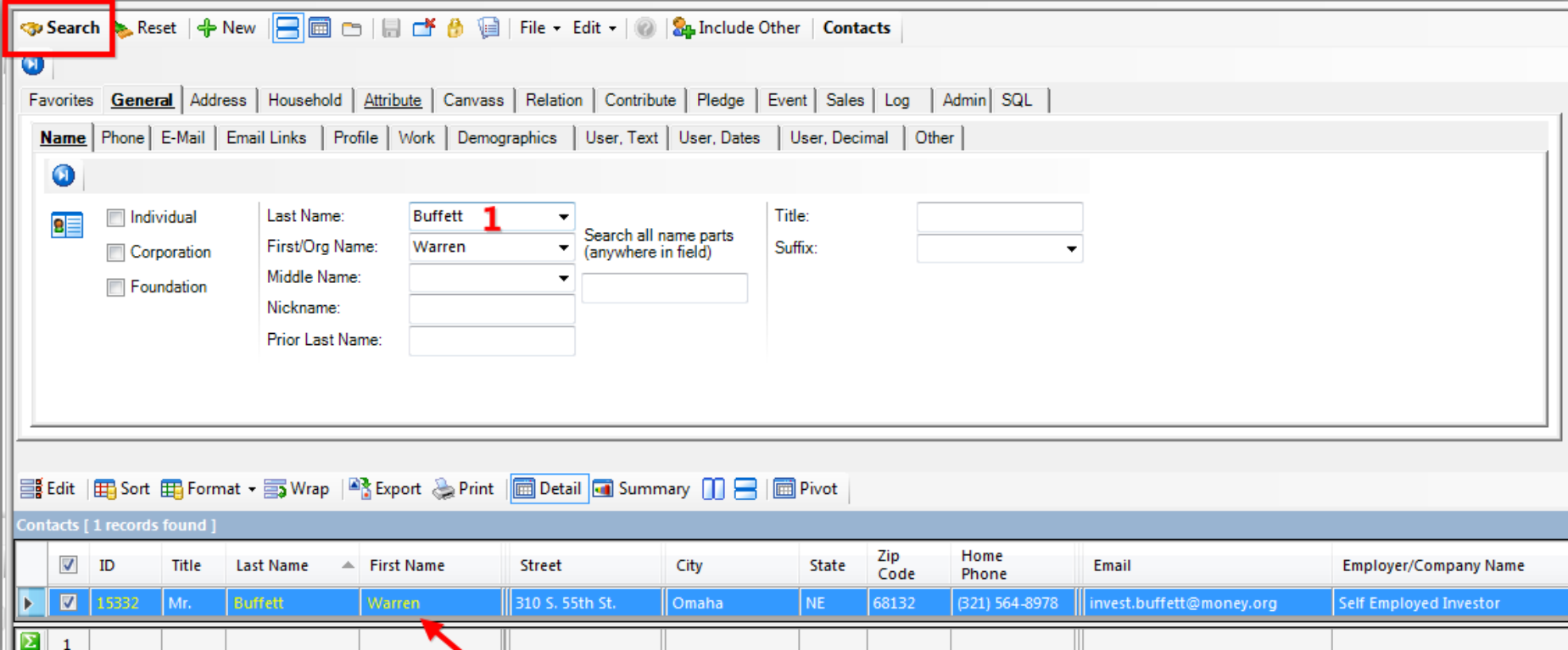
Navigate to the **Contacts (Donors/Voters)** list.



[Search](#) for and **open** the donor's record you want to create a **new pledge** for. Or [create a new donor](#) record if they don't exist – my example is below.

2 Search for and open the donor's record you want to add a pledge for (or create a new one if they don't exist).

2



The screenshot shows the TrailBlazer search interface. At the top, the 'Search' button is highlighted with a red box. Below it, there are tabs for 'General', 'Address', 'Household', 'Attribute', 'Canvass', 'Relation', 'Contribute', 'Pledge', 'Event', 'Sales', 'Log', 'Admin', and 'SQL'. The 'General' tab is active, showing a search form with fields for 'Last Name' (Buffett), 'First/Org Name' (Warren), 'Middle Name', 'Nickname', 'Prior Last Name', 'Title', and 'Suffix'. A red '1' is next to the 'Last Name' dropdown. Below the form is a table with one record found:


ID	Title	Last Name	First Name	Street	City	State	Zip Code	Home Phone	Email	Employer/Company Name
15332	Mr.	Buffett	Warren	310 S. 55th St.	Omaha	NE	68132	(321) 564-8978	invest.buffett@money.org	Self Employed Investor

A red arrow points to the 'Warren' cell in the 'First Name' column, with a red '3' next to it.

3

Navigate to the **Pledge** tab and click the **[+ New]** button.

File Edit [Icons] Email

 **Mr. Warren Buffett [15332]**
 310 S. 55th St.
 Omaha, NE 68132
 invest.buffett@money.org
 Home: 321-564-8978
 Cell: 987-965-4987
 Work: 654-897-8978

Dashboard | **General** | Household | Gallery | Attribute | Poll | Relation | Contribute | **Pledge** | Event | Logs | Sales | Admin

New | Delete | Export | Print

0 Pledges(s)


ID	Pledge Date	Total Amount	Amount Received	Written Off	Amount Open	Strength	Number Scheduled Payments	First Due Date	Last Due Date	Event	Specific Instructions
		.00	.00	.00	.00						

Summary | Payment Schedule | Specific Instructions

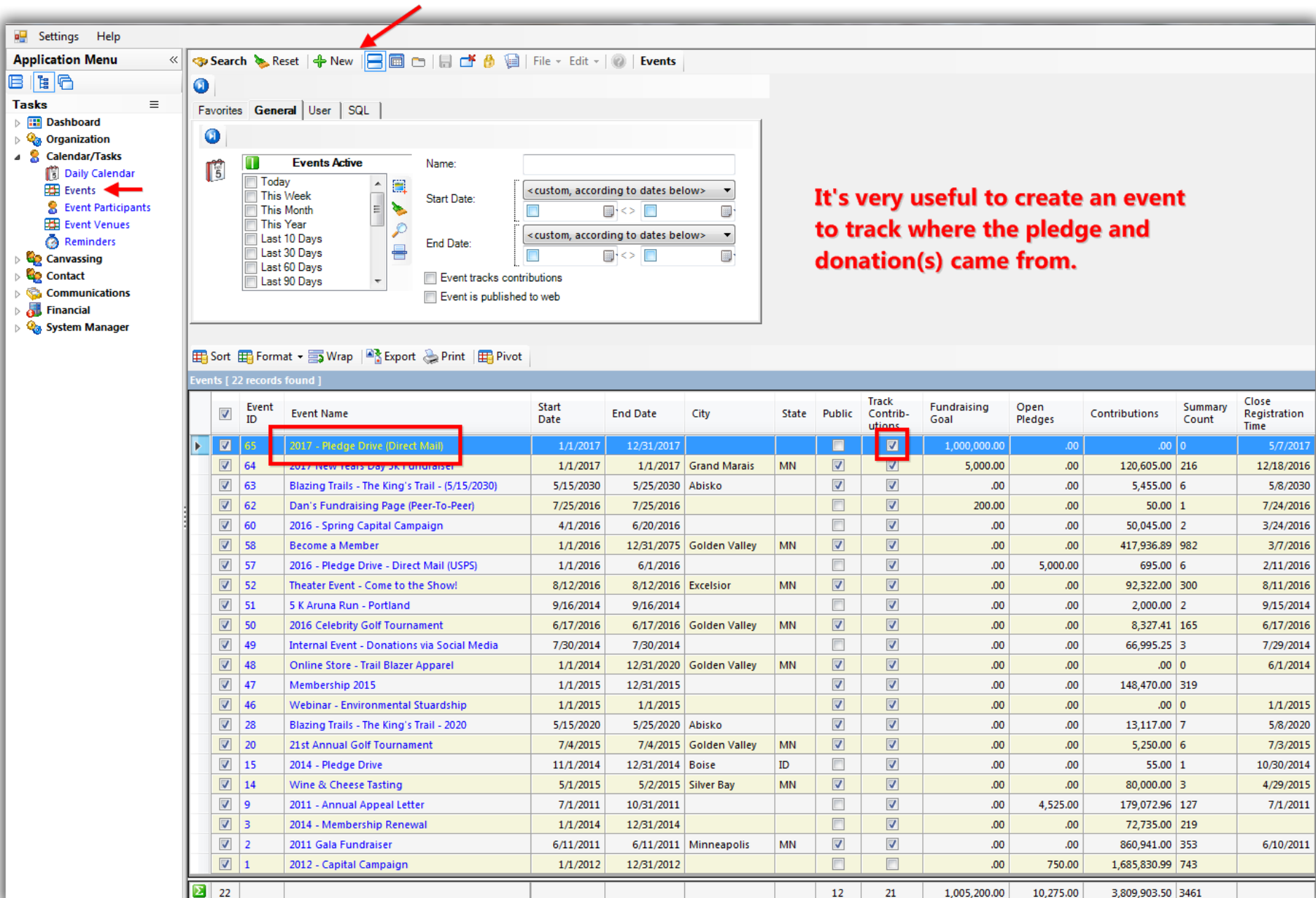
Date:

Event: (none)

Strength:

 **Tip:** It's very useful to **link** the pledge to an '[event](#)' (the source), to accurately track **where** the pledge came from, and then link the **donation** (payment) to the same 'event'. The *example* used in this tutorial was an event called '2017 Pledge Drive (Direct Mail)':

How to Create a Pledge, Apply Payments (Donations) to Open Pledges, and Run Reports for Outstanding Pledges



It's very useful to create an event to track where the pledge and donation(s) came from.

Event ID	Event Name	Start Date	End Date	City	State	Public	Track Contributions	Fundraising Goal	Open Pledges	Contributions	Summary Count	Close Registration Time
65	2017 - Pledge Drive (Direct Mail)	1/1/2017	12/31/2017				<input checked="" type="checkbox"/>	1,000,000.00	.00	.00	0	5/7/2017
64	2017 New Years Day 5K Fundraiser	1/1/2017	1/1/2017	Grand Marais	MN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5,000.00	.00	120,605.00	216	12/18/2016
63	Blazing Trails - The King's Trail - (5/15/2030)	5/15/2030	5/25/2030	Abisko		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	5,455.00	6	5/8/2030
62	Dan's Fundraising Page (Peer-To-Peer)	7/25/2016	7/25/2016			<input type="checkbox"/>	<input checked="" type="checkbox"/>	200.00	.00	50.00	1	7/24/2016
60	2016 - Spring Capital Campaign	4/1/2016	6/20/2016			<input type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	50,045.00	2	3/24/2016
58	Become a Member	1/1/2016	12/31/2075	Golden Valley	MN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	417,936.89	982	3/7/2016
57	2016 - Pledge Drive - Direct Mail (USPS)	1/1/2016	6/1/2016			<input type="checkbox"/>	<input checked="" type="checkbox"/>	.00	5,000.00	695.00	6	2/11/2016
52	Theater Event - Come to the Show!	8/12/2016	8/12/2016	Excelsior	MN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	92,322.00	300	8/11/2016
51	5 K Aruna Run - Portland	9/16/2014	9/16/2014			<input type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	2,000.00	2	9/15/2014
50	2016 Celebrity Golf Tournament	6/17/2016	6/17/2016	Golden Valley	MN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	8,327.41	165	6/17/2016
49	Internal Event - Donations via Social Media	7/30/2014	7/30/2014			<input type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	66,995.25	3	7/29/2014
48	Online Store - Trail Blazer Apparel	1/1/2014	12/31/2020	Golden Valley	MN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	.00	0	6/1/2014
47	Membership 2015	1/1/2015	12/31/2015			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	148,470.00	319	
46	Webinar - Environmental Stewardship	1/1/2015	1/1/2015			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	.00	0	1/1/2015
28	Blazing Trails - The King's Trail - 2020	5/15/2020	5/25/2020	Abisko		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	13,117.00	7	5/8/2020
20	21st Annual Golf Tournament	7/4/2015	7/4/2015	Golden Valley	MN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	5,250.00	6	7/3/2015
15	2014 - Pledge Drive	11/1/2014	12/31/2014	Boise	ID	<input type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	55.00	1	10/30/2014
14	Wine & Cheese Tasting	5/2/2015	5/2/2015	Silver Bay	MN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	80,000.00	3	4/29/2015
9	2011 - Annual Appeal Letter	7/1/2011	10/31/2011			<input type="checkbox"/>	<input checked="" type="checkbox"/>	.00	4,525.00	179,072.96	127	7/1/2011
3	2014 - Membership Renewal	1/1/2014	12/31/2014			<input type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	72,735.00	219	
2	2011 Gala Fundraiser	6/11/2011	6/11/2011	Minneapolis	MN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	.00	.00	860,941.00	353	6/10/2011
1	2012 - Capital Campaign	1/1/2012	12/31/2012			<input type="checkbox"/>	<input type="checkbox"/>	.00	750.00	1,685,830.99	743	
22						12	21	1,005,200.00	10,275.00	3,809,903.50	3461	

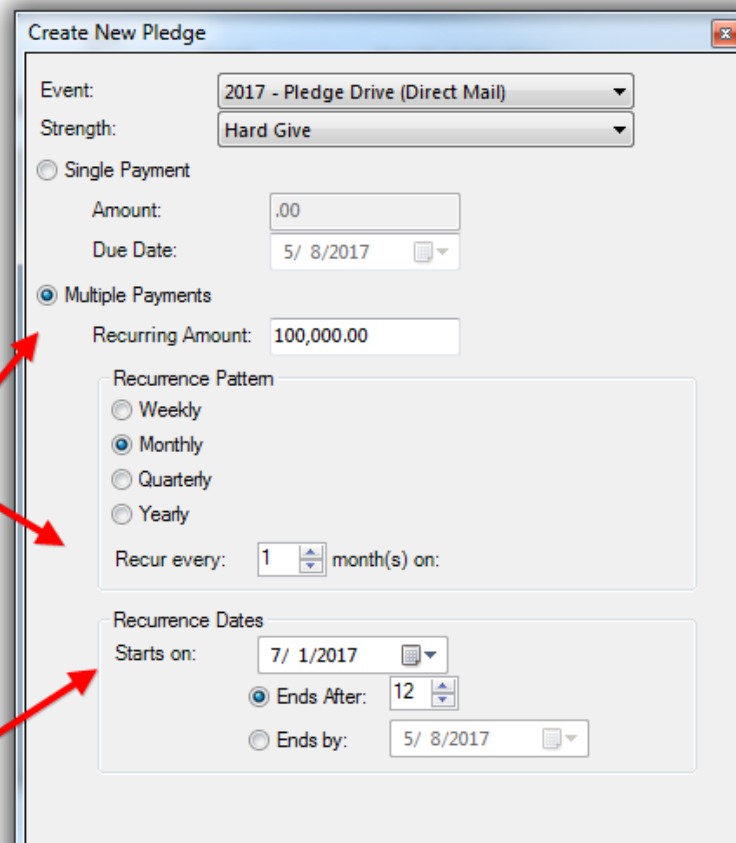
Fill out the pledge **input form** (**single** payment or **multiple** payment, **amount**, first payment **due date**, the **event**, etc.), and then click **[OK]**. *My example is below for a \$1,200,000.00 pledge broken into 12 months that came from the 2017 Pledge Drive (Direct Mail) event.*

Fill out the pledge form.

It's very useful to tie the pledge to an event (the source) so that the donation can also be attached to the same event.

Input the payment due date, the recurrence, amount, etc. and then click [OK].

Example pledge with recurring payments.



Event: 2017 - Pledge Drive (Direct Mail)
Strength: Hard Give

Single Payment
Amount: .00
Due Date: 5/ 8/2017

Multiple Payments
Recurring Amount: 100,000.00

Recurrence Pattern
 Weekly
 Monthly
 Quarterly
 Yearly
Recur every: 1 month(s) on:

Recurrence Dates
Starts on: 7/ 1/2017
 Ends After: 12
 Ends by: 5/ 8/2017

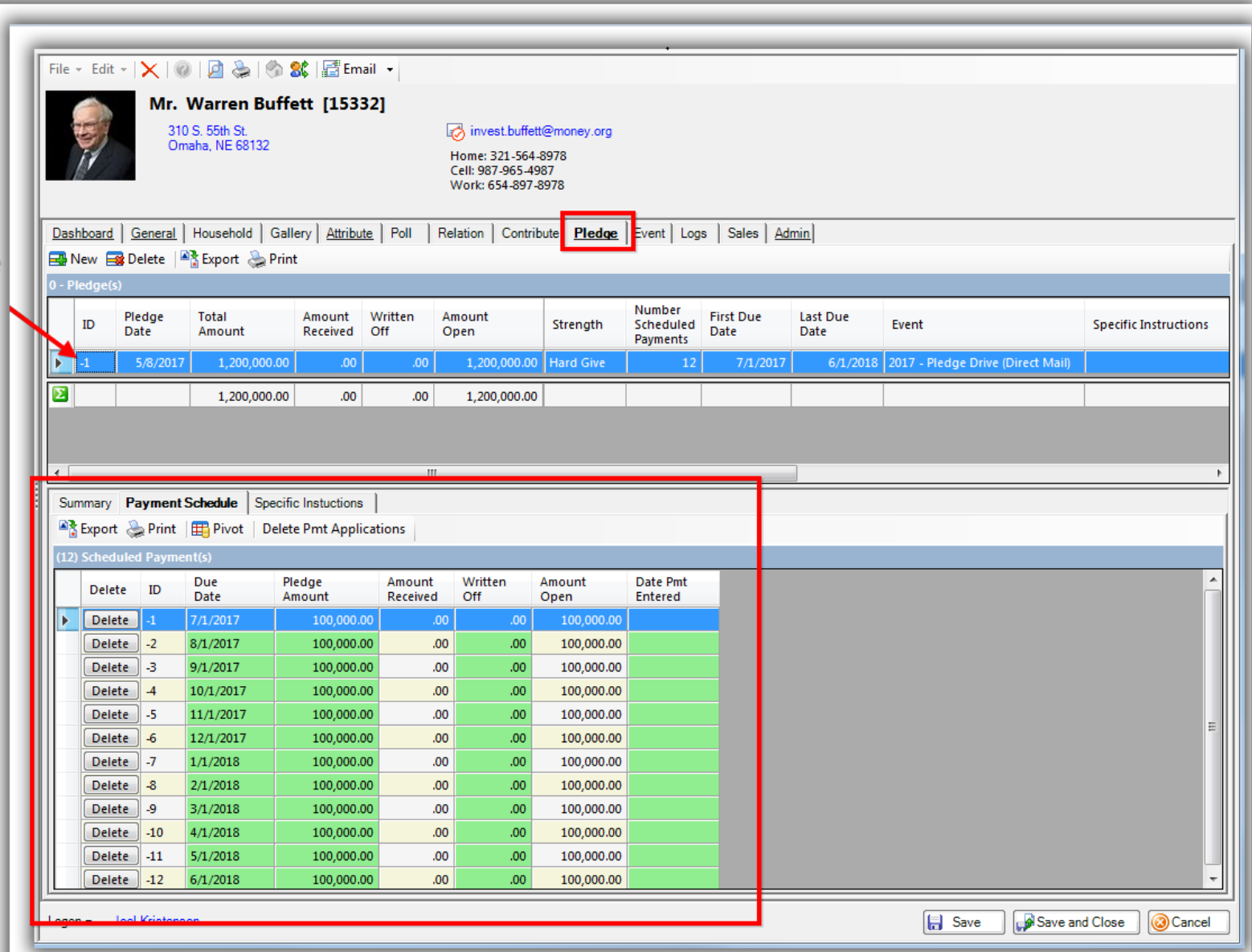
First pledge

After creating the pledge you can view the **details** under the **Payment Schedule** tab. *My example is below.*

How to Create a Pledge, Apply Payments (Donations) to Open Pledges, and Run Reports for Outstanding Pledges

If multiple pledges are present, you can toggle which payment schedule will display by clicking on the different pledges.

In this example there's only one pledge present.



Mr. Warren Buffett [15332]
 310 S. 55th St.
 Omaha, NE 68132
 invest.buffett@money.org
 Home: 321-564-8978
 Cell: 987-965-4987
 Work: 654-897-8978

Dashboard | General | Household | Gallery | Attribute | Poll | Relation | Contribute | **Pledge** | Event | Logs | Sales | Admin

New | Delete | Export | Print

0 - Pledge(s)

ID	Pledge Date	Total Amount	Amount Received	Written Off	Amount Open	Strength	Number Scheduled Payments	First Due Date	Last Due Date	Event	Specific Instructions
-1	5/8/2017	1,200,000.00	.00	.00	1,200,000.00	Hard Give	12	7/1/2017	6/1/2018	2017 - Pledge Drive (Direct Mail)	
		1,200,000.00	.00	.00	1,200,000.00						

Summary | **Payment Schedule** | Specific Instructions

Export | Print | Pivot | Delete Pmt Applications

(12) Scheduled Payment(s)

Delete	ID	Due Date	Pledge Amount	Amount Received	Written Off	Amount Open	Date Pmt Entered
Delete	-1	7/1/2017	100,000.00	.00	.00	100,000.00	
Delete	-2	8/1/2017	100,000.00	.00	.00	100,000.00	
Delete	-3	9/1/2017	100,000.00	.00	.00	100,000.00	
Delete	-4	10/1/2017	100,000.00	.00	.00	100,000.00	
Delete	-5	11/1/2017	100,000.00	.00	.00	100,000.00	
Delete	-6	12/1/2017	100,000.00	.00	.00	100,000.00	
Delete	-7	1/1/2018	100,000.00	.00	.00	100,000.00	
Delete	-8	2/1/2018	100,000.00	.00	.00	100,000.00	
Delete	-9	3/1/2018	100,000.00	.00	.00	100,000.00	
Delete	-10	4/1/2018	100,000.00	.00	.00	100,000.00	
Delete	-11	5/1/2018	100,000.00	.00	.00	100,000.00	
Delete	-12	6/1/2018	100,000.00	.00	.00	100,000.00	

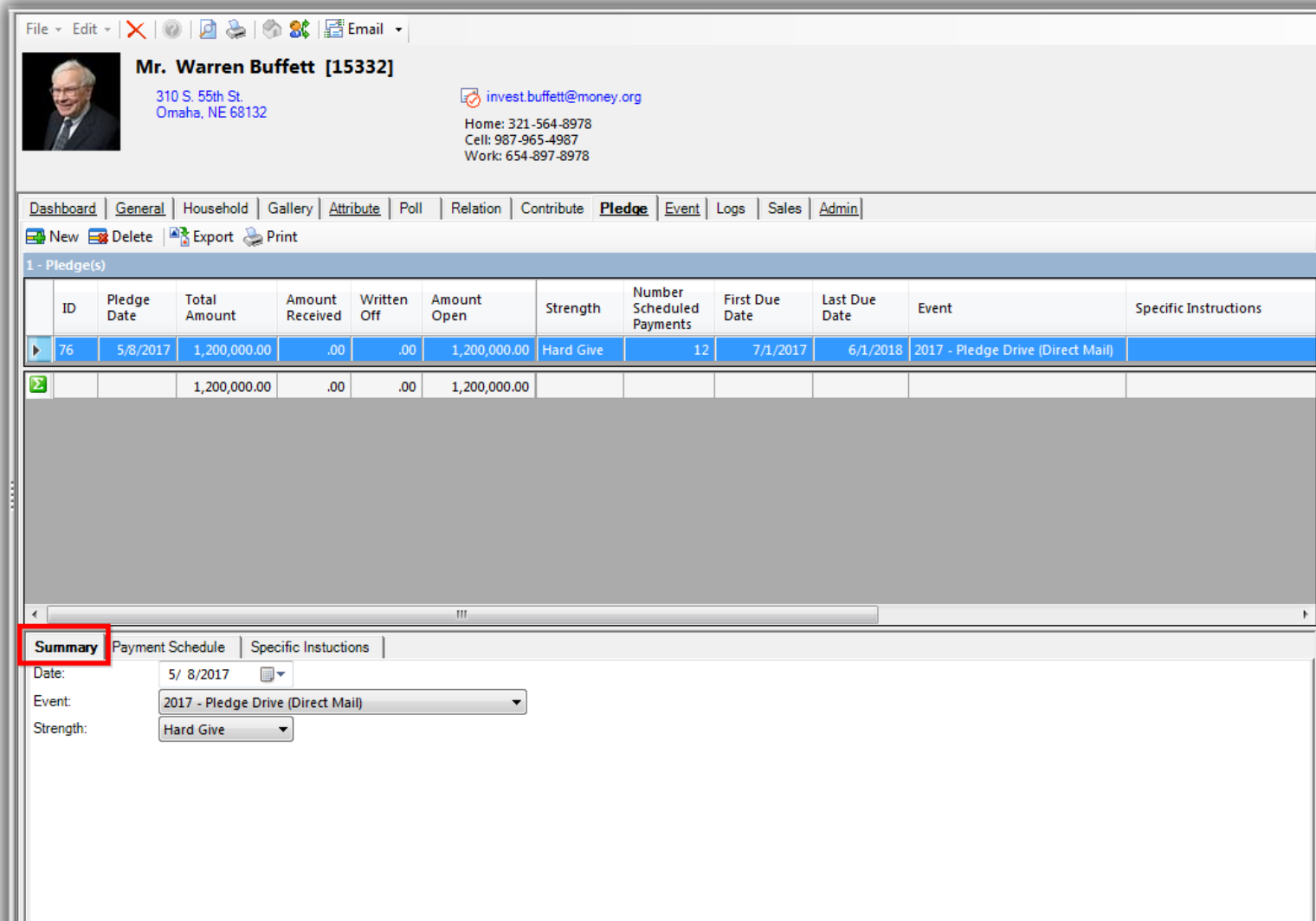
Save | Save and Close | Cancel

You can make further **adjustments** under the **Summary** tab.


One **common change** is the **date** of the pledge (which is the **original pledge date**, **not** the due date). It's common to change this *if* you are **backfilling data** and the person pledged **prior** to the date you are entering it. **It's critical you enter the pledge date prior to the contribution date or it won't apply correctly when the payment (donation) comes in.**

Under the 'Summary' tab you can modify the 'Pledge Date' (which is the original date that the donor pledged, *not* the due date). You can also modify the 'Event' and the pledge 'Strength'.

It's not uncommon that if you are backfilling pledge data you'll need to change the 'pledge date' to an earlier date than the date you are inputting the pledge.



File Edit X [Icons] Email

 **Mr. Warren Buffett [15332]**
310 S. 55th St.
Omaha, NE 68132
invest.buffett@money.org
Home: 321-564-8978
Cell: 987-965-4987
Work: 654-897-8978

Dashboard | General | Household | Gallery | Attribute | Poll | Relation | Contribute | **Pledge** | Event | Logs | Sales | Admin

New Delete Export Print

1 - Pledge(s)


ID	Pledge Date	Total Amount	Amount Received	Written Off	Amount Open	Strength	Number Scheduled Payments	First Due Date	Last Due Date	Event	Specific Instructions
76	5/8/2017	1,200,000.00	.00	.00	1,200,000.00	Hard Give	12	7/1/2017	6/1/2018	2017 - Pledge Drive (Direct Mail)	
		1,200,000.00	.00	.00	1,200,000.00						

Summary | Payment Schedule | Specific Instructions

Date: 5/ 8/2017
Event: 2017 - Pledge Drive (Direct Mail)
Strength: Hard Give

You can add **special instructions** under the **Special Instructions** tab. *My example is below.*

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Mr. Warren Buffett [15332]

310 S. 55th St.
Omaha, NE 68132

invest.buffett@money.org

Home: 321-564-8978
Cell: 987-965-4987
Work: 654-897-8978

Dashboard | General | Household | Gallery | Attribute | Poll | Relation | Contribute | Pledge | Event | Logs | Sales | Admin

New Delete Export Print

1 - Pledge(s)

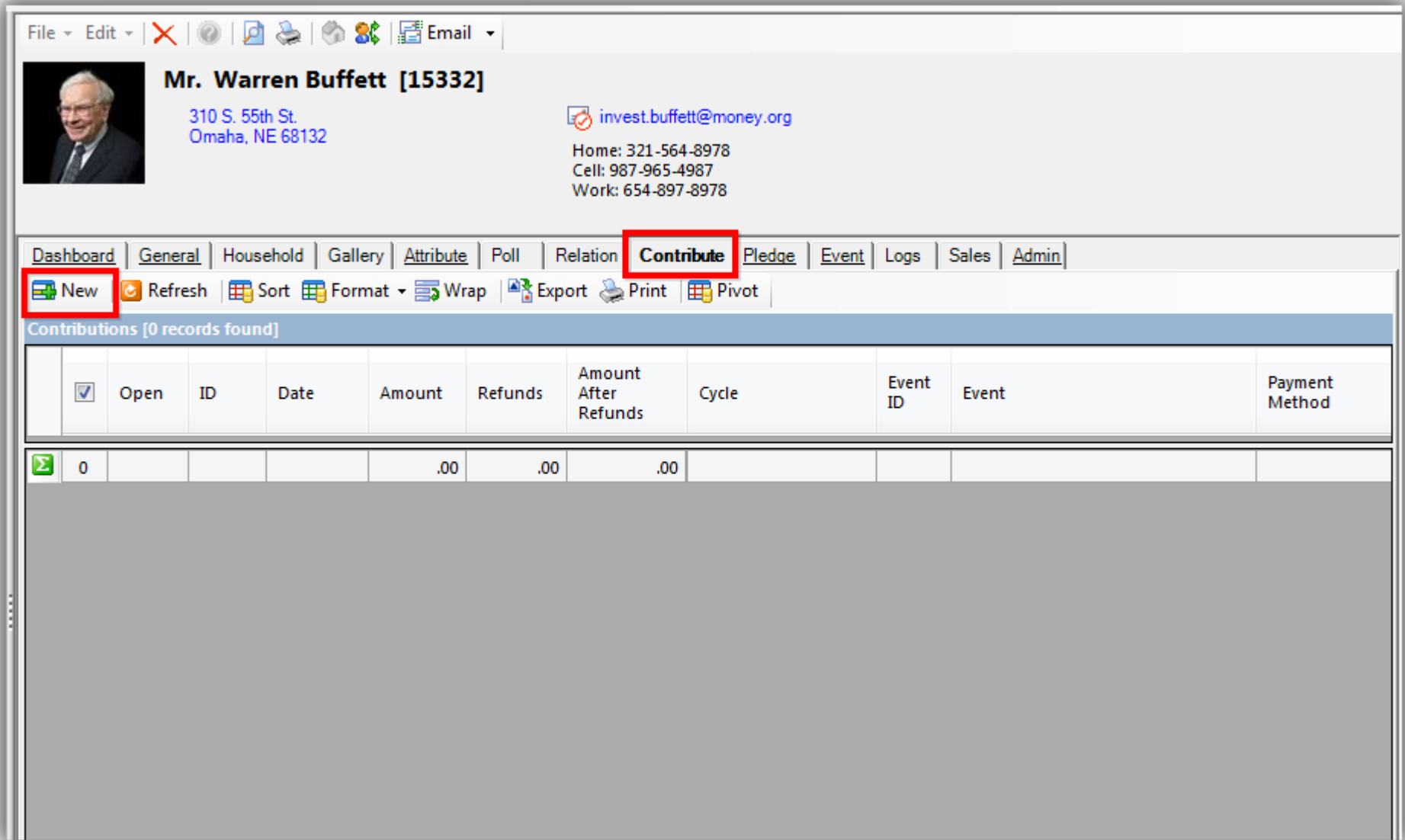
ID	Pledge Date	Total Amount	Amount Received	Written Off	Amount Open	Strength	Number Scheduled Payments	First Due Date	Last Due Date	Event	Specific Instructions
▶ 76	5/8/2017	1,200,000.00	.00	.00	1,200,000.00	Hard Give	12	7/1/2017	6/1/2018	2017 - Pledge Drive (Direct Mail)	
▶		1,200,000.00	.00	.00	1,200,000.00						

Summary | Payment Schedule | Specific Instructions

Mr. Buffett agreed to fulfill his pledge as long as 100% of the donations are allocated to education projects for women and children in Afganistan.

You can include specific instructions for the pledge under the 'Special Instructions' tab.

When the **payment** ([donation](#)) for a pledge comes in, **open** the donor's record card, navigate to the **Contribute** tab, and click the **[+ New]** button.



The screenshot displays the TrailBlazer software interface. At the top, there is a menu bar with options: File, Edit, and Email. Below this is a user profile for **Mr. Warren Buffett [15332]**. The profile includes a photo, address (310 S. 55th St., Omaha, NE 68132), email (invest.buffett@money.org), and phone numbers (Home: 321-564-8978, Cell: 987-965-4987, Work: 654-897-8978).

Below the profile is a navigation menu with tabs: Dashboard, General, Household, Gallery, Attribute, Poll, Relation, **Contribute**, Pledge, Event, Logs, Sales, and Admin. The **Contribute** tab is highlighted with a red box. Below the navigation menu is a toolbar with icons for New, Refresh, Sort, Format, Wrap, Export, Print, and Pivot. The **New** icon is also highlighted with a red box.

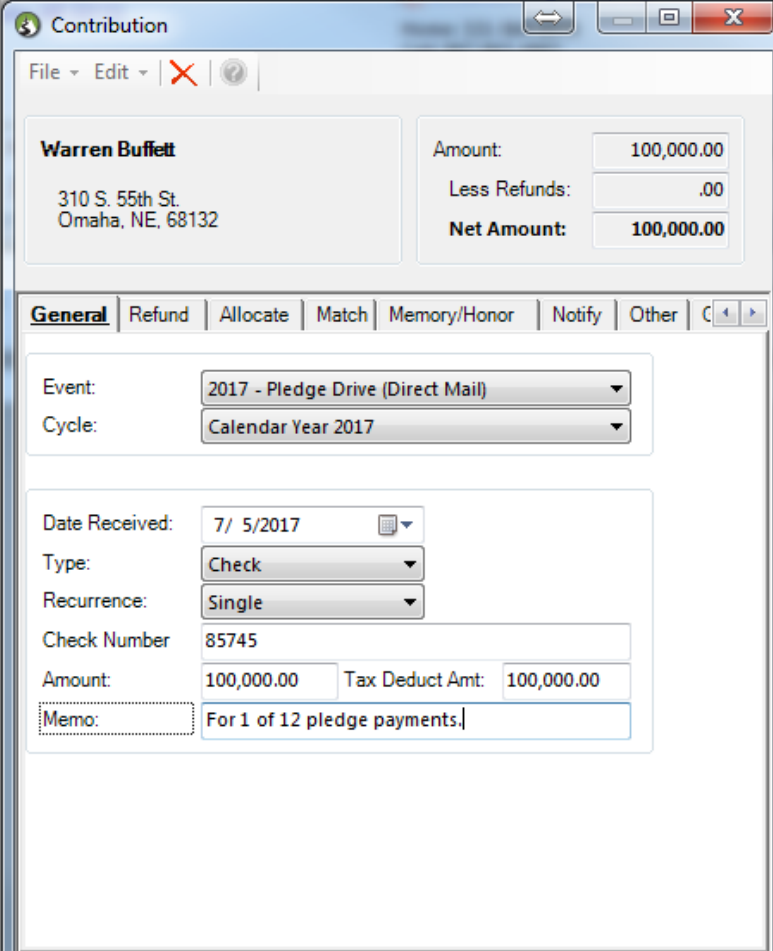
The main content area shows a table titled "Contributions [0 records found]". The table has the following columns: Open, ID, Date, Amount, Refunds, Amount After Refunds, Cycle, Event ID, Event, and Payment Method. The table is currently empty, with a single row showing a total of 0 records.

<input checked="" type="checkbox"/>	Open	ID	Date	Amount	Refunds	Amount After Refunds	Cycle	Event ID	Event	Payment Method
Σ	0			.00	.00	.00				

Fill out the donation input form and click **[Save and Close]**. *If* your pledge is linked to an [event](#), make **sure** the donation is linked to the **same** event. The donation **date** must come **after** the pledge date. *My example is below.*

When the donation comes in, fill out the donation form. The date of the donation *needs* to be after the 'pledge date'.

It's important to link the donation to the same event as the pledge is linked (if applicable).



The screenshot shows the 'Contribution' form in TrailBlazer. The donor is Warren Buffett, with address 310 S. 55th St., Omaha, NE, 68132. The amount is 100,000.00, with no refunds, resulting in a net amount of 100,000.00. The form is set to 'General' and linked to the event '2017 - Pledge Drive (Direct Mail)' for the 'Calendar Year 2017'. The date received is 7/5/2017, the type is 'Check', and the recurrence is 'Single'. The check number is 85745, and the amount and tax deduct amount are both 100,000.00. The memo field contains 'For 1 of 12 pledge payments.'

Warren Buffett	Amount:	100,000.00
310 S. 55th St. Omaha, NE, 68132	Less Refunds:	.00
	Net Amount:	100,000.00

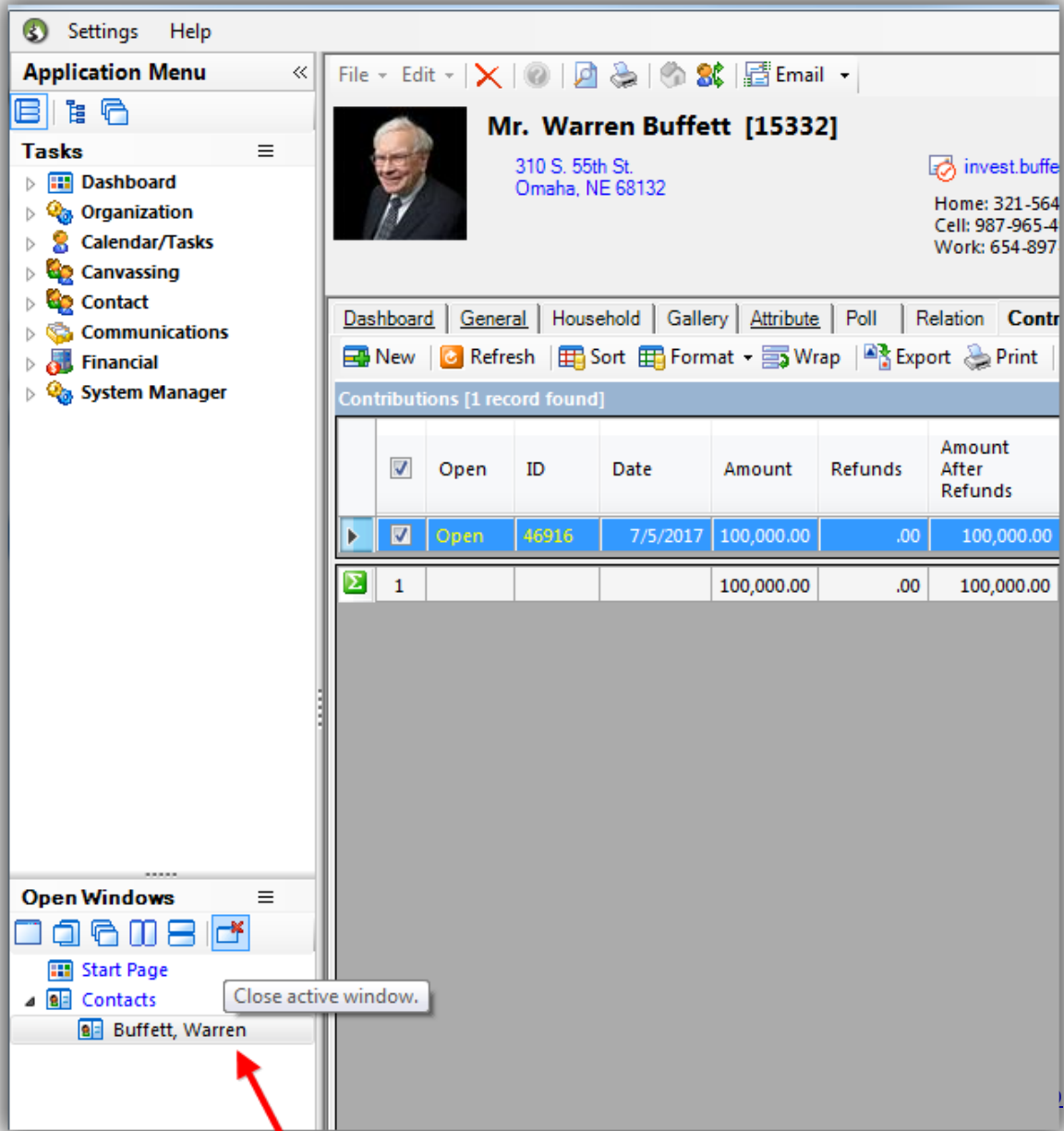
General | Refund | Allocate | Match | Memory/Honor | Notify | Other | C

Event: 2017 - Pledge Drive (Direct Mail)
Cycle: Calendar Year 2017

Date Received: 7/ 5/2017
Type: Check
Recurrence: Single
Check Number: 85745
Amount: 100,000.00 Tax Deduct Amt: 100,000.00
Memo: For 1 of 12 pledge payments.

Close out of the donor's record card before proceeding to apply the donation towards the open pledge. *The process **won't** work if the donor's record card is open. If you're going to mass apply multiple donations make sure all of the donor's records are closed. This article shows how to mass [unlock](#) donor records.*

How to Create a Pledge, Apply Payments (Donations) to Open Pledges, and Run Reports for Outstanding Pledges



The screenshot shows the TrailBlazer application interface. On the left is an 'Application Menu' with categories like Dashboard, Organization, Calendar/Tasks, etc. The main window displays a contact record for 'Mr. Warren Buffett [15332]' with a photo and address. Below the contact info is a tabbed interface with 'Contributions' selected. A table shows one contribution record.

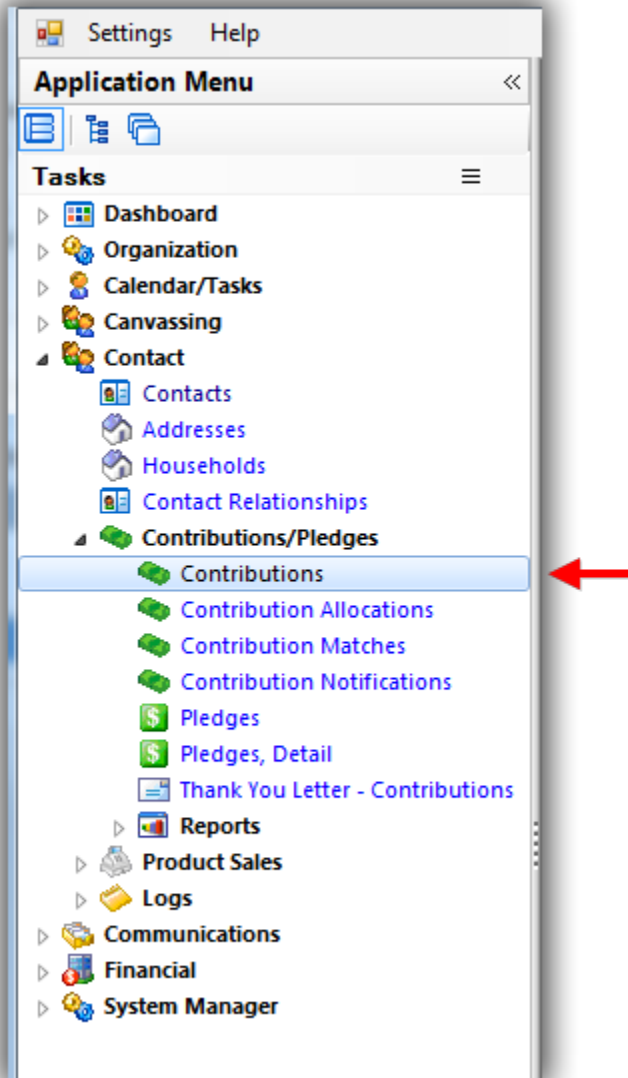
	<input checked="" type="checkbox"/>	Open	ID	Date	Amount	Refunds	Amount After Refunds
	<input checked="" type="checkbox"/>	Open	46916	7/5/2017	100,000.00	.00	100,000.00
					100,000.00	.00	100,000.00

At the bottom left, the 'Open Windows' pane shows 'Buffett, Warren' selected. A red arrow points to this window title, and a tooltip 'Close active window.' is visible over the window icon.

The next section walks through the steps to **apply** a **single** donation to an open pledge and how to apply a **list of donations** to open pledges en masse.

#2 – Applying Donations to Open Pledges from the ‘Contributions List’ (Single Apply & Mass Apply)

Navigate to the **Contributions** list under the **Application Menu**.



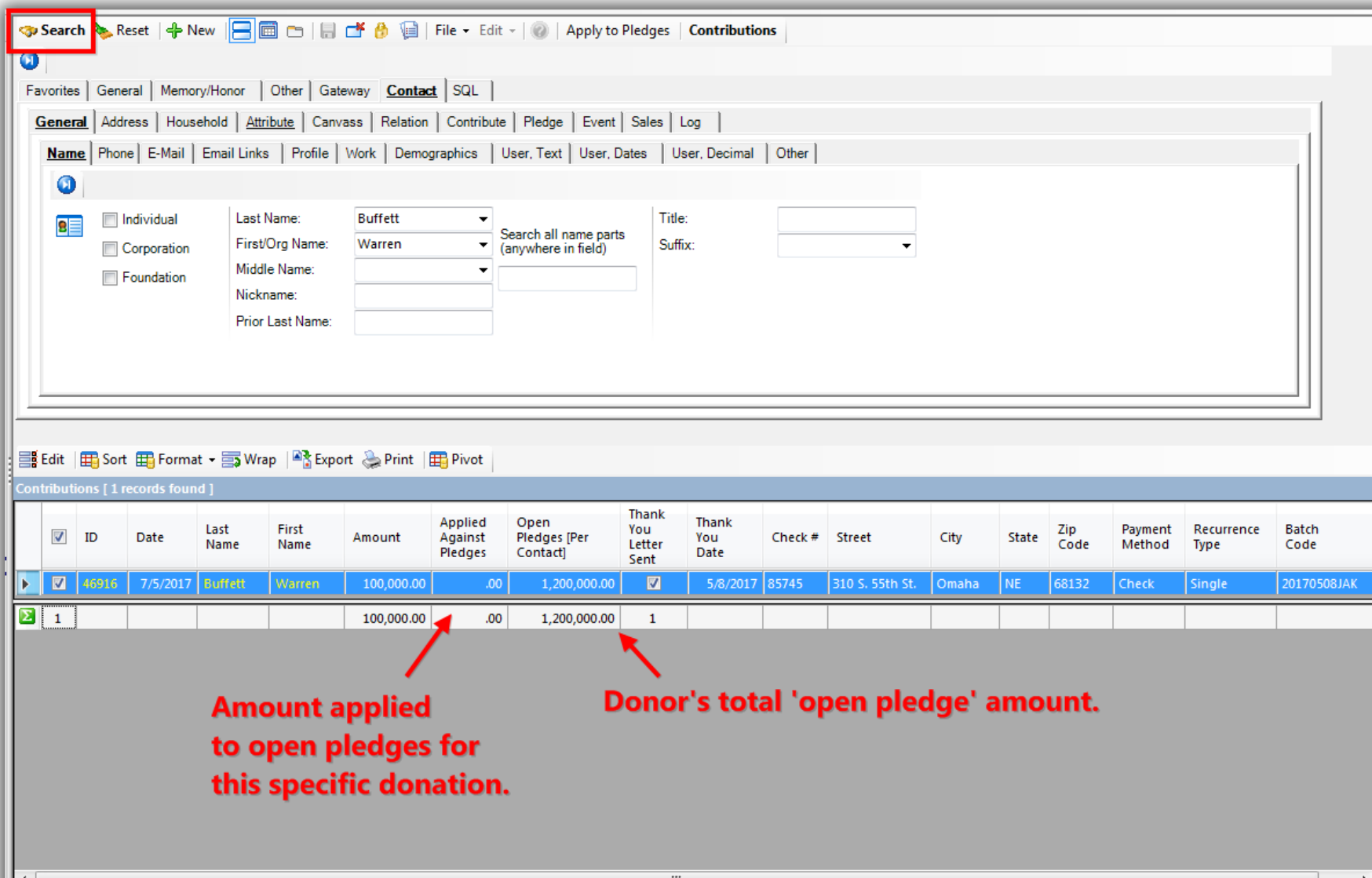
Single Apply

Run a **search query** for the donation you want to apply to an open pledge.

Some common examples would be by **date** or by the donor's **name**. The columns for **open pledge amount**, and **amount applied** will display by default. *In this example I searched by the donor's name and they currently had one donation present.*

Run your search query for the donation(s) you need to apply to open pledges.

In this example I searched by the donor's name, but you could filter by other things such as date.



The screenshot shows the TrailBlazer software interface. At the top, there is a search bar with a magnifying glass icon and the word "Search" highlighted in a red box. Below the search bar, there are several tabs for navigation: "General", "Memory/Honor", "Other", "Gateway", "Contact", and "SQL". The "Contact" tab is selected. Underneath, there are more tabs: "General", "Address", "Household", "Attribute", "Canvass", "Relation", "Contribute", "Pledge", "Event", "Sales", and "Log". The "General" tab is selected, and it shows a form for entering contact information. The form includes fields for "Last Name" (Buffett), "First/Org Name" (Warren), "Middle Name", "Nickname", "Prior Last Name", "Title", and "Suffix". There is also a search box labeled "Search all name parts (anywhere in field)".

Below the form, there is a table of contributions. The table has the following columns: ID, Date, Last Name, First Name, Amount, Applied Against Pledges, Open Pledges [Per Contact], Thank You Letter Sent, Thank You Date, Check #, Street, City, State, Zip Code, Payment Method, Recurrence Type, and Batch Code. The table shows one record found:

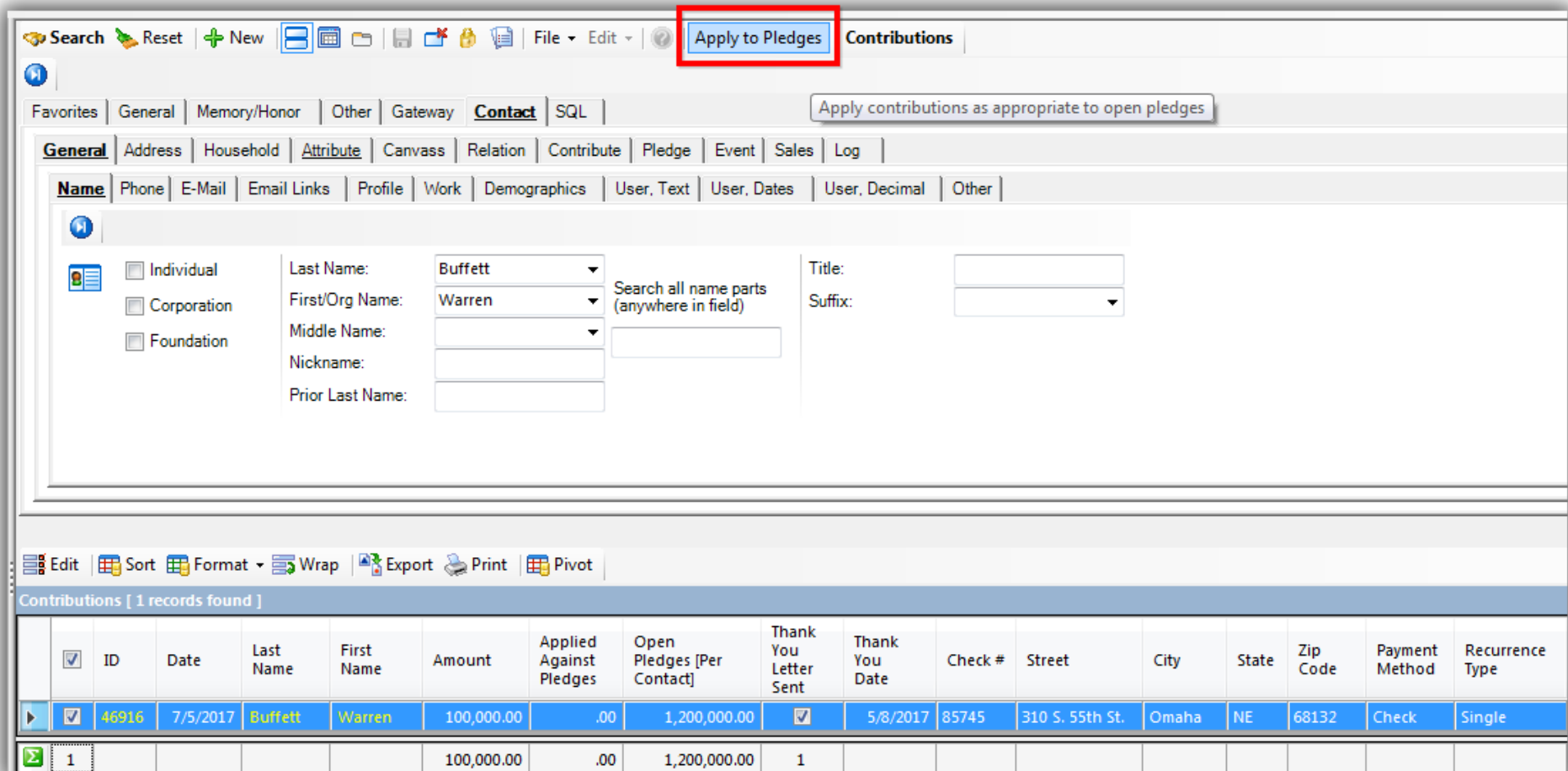
ID	Date	Last Name	First Name	Amount	Applied Against Pledges	Open Pledges [Per Contact]	Thank You Letter Sent	Thank You Date	Check #	Street	City	State	Zip Code	Payment Method	Recurrence Type	Batch Code
46916	7/5/2017	Buffett	Warren	100,000.00	.00	1,200,000.00	<input checked="" type="checkbox"/>	5/8/2017	85745	310 S. 55th St.	Omaha	NE	68132	Check	Single	20170508JAK

Two red arrows point to the "Amount" and "Open Pledges [Per Contact]" columns of the table. The "Amount" column has a value of 100,000.00, and the "Open Pledges [Per Contact]" column has a value of 1,200,000.00. Below the table, there are two red text annotations:

Amount applied to open pledges for this specific donation.

Donor's total 'open pledge' amount.

Click the **[Apply to Pledges]** button at the top of the screen.

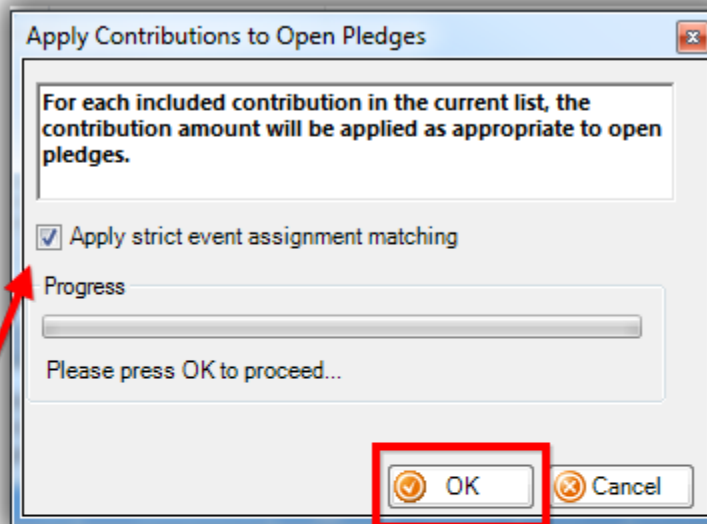


The screenshot shows the TrailBlazer software interface. At the top, there is a navigation bar with buttons for Search, Reset, New, and a menu with 'Apply to Pledges' highlighted in a red box. Below this is a 'Contributions' tab and a search bar containing the text 'Apply contributions as appropriate to open pledges'. The main area is divided into several sections: 'General' (with sub-tabs for Address, Household, Attribute, etc.), 'Name' (with sub-tabs for Phone, E-Mail, etc.), and a form for entering contact details. The form includes fields for Last Name (Buffett), First/Org Name (Warren), Middle Name, Nickname, Prior Last Name, Title, and Suffix. Below the form is a toolbar with options like Edit, Sort, Format, Wrap, Export, Print, and Pivot. At the bottom, a table displays 'Contributions [1 records found]' with the following data:

ID	Date	Last Name	First Name	Amount	Applied Against Pledges	Open Pledges [Per Contact]	Thank You Letter Sent	Thank You Date	Check #	Street	City	State	Zip Code	Payment Method	Recurrence Type
46916	7/5/2017	Buffett	Warren	100,000.00	.00	1,200,000.00	<input checked="" type="checkbox"/>	5/8/2017	85745	310 S. 55th St.	Omaha	NE	68132	Check	Single

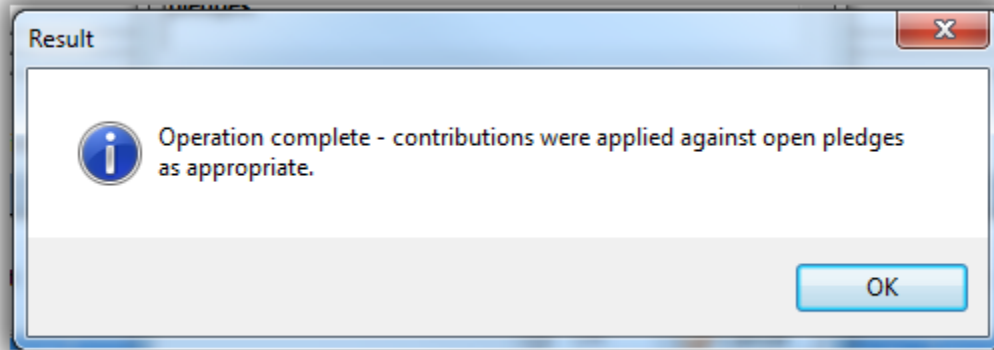
By **default** a box will be checked to enforce strict **event assignment** between pledges and donations. Typically you'll leave this checked **unless* your donation and pledge have different events recorded, or one has an event linked and the other doesn't and you still need them to apply.

Click **[OK]** to proceed. *In my example the pledge and donation had matching events (which is the most common).*



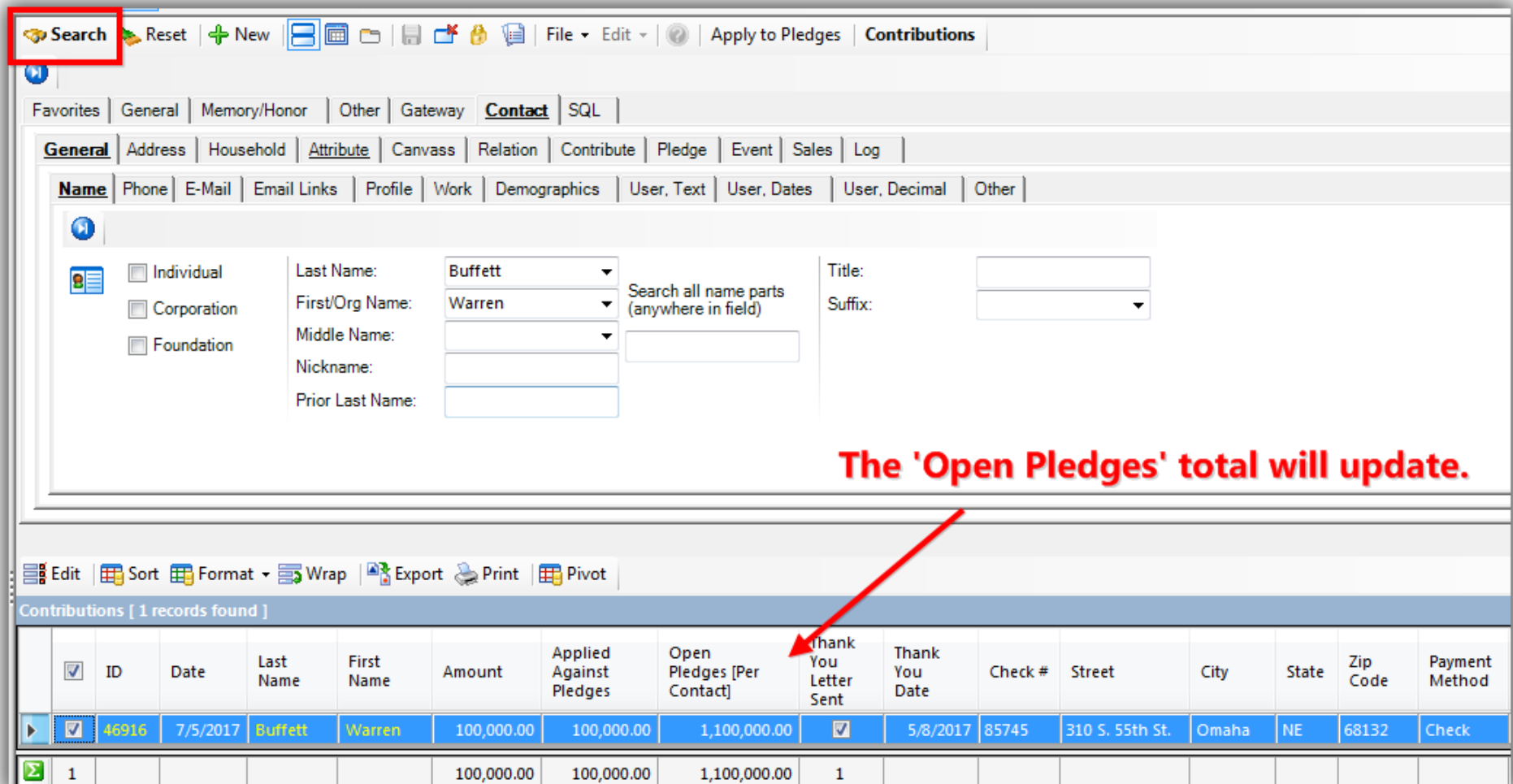
If you pledge and donations are linked to events you'll want to leave this box checked (which it is by default) but you do have the option to uncheck it if necessary.

Click **[OK]** once the operation has finished.



Back in the Contributions list, click **[Search]** to refresh the list and the amount applied values for pledges will update.

Click [Search] to refresh the list.



The screenshot shows the TrailBlazer software interface. At the top, there is a search bar with a magnifying glass icon, which is highlighted with a red box. Below the search bar, there are several tabs: Favorites, General, Memory/Honor, Other, Gateway, Contact, and SQL. The 'Contact' tab is selected. Below the tabs, there are several sub-tabs: General, Address, Household, Attribute, Canvass, Relation, Contribute, Pledge, Event, Sales, and Log. The 'General' sub-tab is selected. Below the sub-tabs, there are several fields for entering contact information: Individual, Corporation, and Foundation (checkboxes); Last Name (dropdown menu with 'Buffett' selected); First/Org Name (dropdown menu with 'Warren' selected); Middle Name (dropdown menu); Nickname (text field); Prior Last Name (text field); Title (text field); and Suffix (dropdown menu). Below the contact information fields, there is a table of contributions. The table has the following columns: ID, Date, Last Name, First Name, Amount, Applied Against Pledges, Open Pledges (Per Contact), Thank You Letter Sent, Thank You Date, Check #, Street, City, State, Zip Code, and Payment Method. The table contains one record with the following data: ID: 46916, Date: 7/5/2017, Last Name: Buffett, First Name: Warren, Amount: 100,000.00, Applied Against Pledges: 100,000.00, Open Pledges (Per Contact): 1,100,000.00, Thank You Letter Sent: checked, Thank You Date: 5/8/2017, Check #: 85745, Street: 310 S. 55th St., City: Omaha, State: NE, Zip Code: 68132, Payment Method: Check. A red arrow points from the text 'The 'Open Pledges' total will update.' to the 'Open Pledges (Per Contact)' column. Another red arrow points from the text 'The 'applied to pledges' amount will update accordingly.' to the 'Applied Against Pledges' column.

The 'Open Pledges' total will update.

The 'applied to pledges' amount will update accordingly.

ID	Date	Last Name	First Name	Amount	Applied Against Pledges	Open Pledges (Per Contact)	Thank You Letter Sent	Thank You Date	Check #	Street	City	State	Zip Code	Payment Method
46916	7/5/2017	Buffett	Warren	100,000.00	100,000.00	1,100,000.00	<input checked="" type="checkbox"/>	5/8/2017	85745	310 S. 55th St.	Omaha	NE	68132	Check

The 'applied to pledges' amount will update accordingly.

Mass Apply

Run a search query for a **list of donations** and click the **[Apply to Pledges]** button at the top of the screen. The system will **only apply** donations **where applicable** so it's quite likely there will be some donations that populate your list that won't apply to open pledges. *In this example I searched for all donations since 1/1/2016 which produced 114 results.*

Note: The system will **not over apply** pledges to donations that are in the list, so you don't have to worry about only searching for donation records that need a pledge applied.

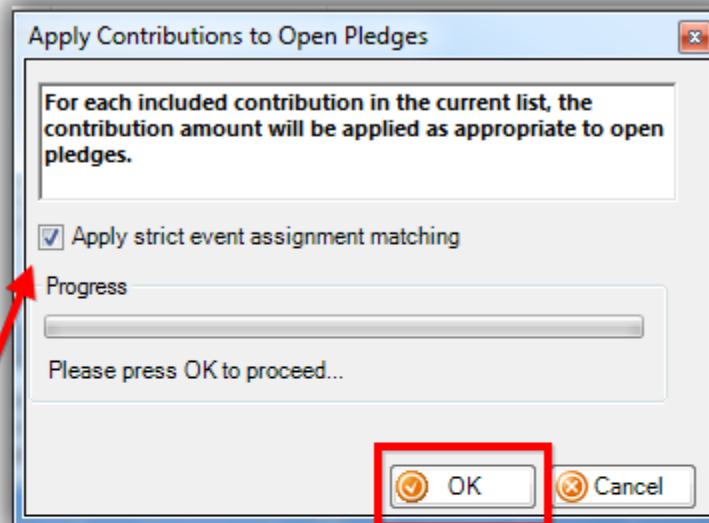
How to Create a Pledge, Apply Payments (Donations) to Open Pledges, and Run Reports for Outstanding Pledges

The screenshot shows the TrailBlazer software interface. At the top, there is a menu bar with 'Search' (labeled 2), 'Apply to Pledges' (labeled 3), and 'Contributions'. Below the menu bar, there are several tabs: 'General', 'Memory/Honor', 'Other', 'Gateway', 'Contact', and 'SQL'. The 'General' tab is selected. On the left side, there are search filters for 'Date Range' (labeled 1), 'Cycle', 'Event', 'Amount Range', and 'Batch Code'. The 'Date Range' filter is set to '<custom, according to dates below>' with a date of '1/ 1/2016'. On the right side, there are dropdown menus for 'Products', 'Recurrence', 'Deductibility', 'Exclude Event', and 'Alloc. Fund', all set to '<ignore>'. Below the filters, there is a red text box that says: 'You apply pledge payments (donations) en masse as well. One common example of this is to query by date range.'

Contributions [114 records found]

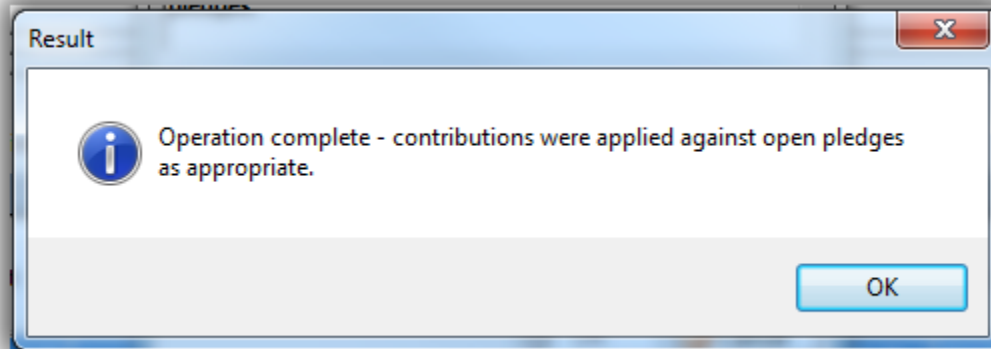
<input checked="" type="checkbox"/>	ID	Date	Last Name	First Name	Amount	Applied Against Pledges	Open Pledges [Per Contact]	Thank You Letter Sent	Thank You Date	Check #	Street
<input checked="" type="checkbox"/>	46916	7/5/2017	Buffett	Warren	100,000.00	100,000.00	1,100,000.00	<input checked="" type="checkbox"/>	5/8/2017	85745	310 S. 55th St.
<input checked="" type="checkbox"/>	46915	3/13/2017	Smithers	Franky	88.00	.00	.00	<input type="checkbox"/>			8543
<input checked="" type="checkbox"/>	46914	2/16/2017	Kristenson	Joel	10.00	.00	.00	<input type="checkbox"/>			9110 Golden Valley Rd
<input checked="" type="checkbox"/>	46913	2/7/2017	Kristenson	Joel	115.00	.00	.00	<input type="checkbox"/>			9110 Golden Valley Rd
<input checked="" type="checkbox"/>	46912	1/5/2017	Ellison	Larry	120,000.00	.00	.00	<input type="checkbox"/>		9786	900 2nd Ave S
<input checked="" type="checkbox"/>	46904	12/20/2016		Hormel Foods	50.00	.00	.00	<input checked="" type="checkbox"/>	12/20/2016	4545	6500 City Pkwy W
<input checked="" type="checkbox"/>	46909	12/20/2016	Ortega	Amancio	605.00	.00	.00	<input type="checkbox"/>			60 E Broadway
<input checked="" type="checkbox"/>	46907	12/9/2016	Miller	Frankie Joe	2,630.00	.00	.00	<input checked="" type="checkbox"/>	12/20/2016		616 Shore Dr N
<input checked="" type="checkbox"/>	46906	12/9/2016	Hall	Nancy	195.00	.00	.00	<input checked="" type="checkbox"/>	12/20/2016		14464 Eldorado St NW
<input checked="" type="checkbox"/>	46905	12/8/2016	Musk	Elon	2,630.00	.00	.00	<input checked="" type="checkbox"/>	12/20/2016		12 Savona Rd
<input checked="" type="checkbox"/>	46903	12/5/2016	Smith	Bob	50.00	.00	.00	<input checked="" type="checkbox"/>	12/20/2016	1245	4440 Thomas Ave S
<input checked="" type="checkbox"/>	46902	11/18/2016	Allanson	Willard	5,000.00	.00	.00	<input checked="" type="checkbox"/>	12/20/2016		2652 Paradise Trl NW
<input checked="" type="checkbox"/>	46893	11/18/2016	Horton	Billy Bob	500.00	.00	.00	<input checked="" type="checkbox"/>	12/20/2016		546 Lake St E
<input checked="" type="checkbox"/>	46892	11/18/2016	Udvari	Joseph	500.00	.00	.00	<input checked="" type="checkbox"/>	12/20/2016		2717 Delaware St SE
<input checked="" type="checkbox"/>	46899	11/14/2016	Adelman	Edward	989.00	.00	.00	<input checked="" type="checkbox"/>	12/20/2016		641 6th St
<input checked="" type="checkbox"/>	46585	11/8/2016	Addington	Rachel	55.00	.00	.00	<input checked="" type="checkbox"/>	12/20/2016		
<input checked="" type="checkbox"/>	46584	11/3/2016	Aaron	Mithran	5,000.00	.00	.00	<input checked="" type="checkbox"/>	12/20/2016	5645	595 Vista Ave SE
<input checked="" type="checkbox"/>	46583	11/2/2016	Kristenson	Joel	45.00	.00	.00	<input checked="" type="checkbox"/>	12/20/2016		9110 Golden Valley Rd
<input checked="" type="checkbox"/>	46900	10/10/2016	Wynn	Collette	65.00	.00	.00	<input checked="" type="checkbox"/>	12/20/2016		17453 Glacier Way

Choose your option for how to apply pledges and click **[OK]**. *(Typically you'll leave the default box checked to apply strict event assignment).*



If you pledge and donations are linked to events you'll want to leave this box checked (which it is by default) but you do have the option to uncheck it if necessary.

Click **[OK]** once prompted that the operation is complete.



Click **[Search]** to refresh the list and the values will update accordingly.

You can open a donor's record card and **view** their pledge **payment schedule** to verify the payments were applied correctly. *My example is below for Warren Buffet where the first payment was applied out of 12 payments.*

How to Create a Pledge, Apply Payments (Donations) to Open Pledges, and Run Reports for Outstanding Pledges

File Edit [Icons] Email

Mr. Warren Buffett [15332]
 310 S. 55th St.
 Omaha, NE 68132
 invest.buffett@money.org
 Home: 321-564-8978
 Cell: 987-965-4987
 Work: 654-897-8978

Dashboard | General | Household | Gallery | Attribute | Poll | Relation | Contribute | **Pledge** | Event | Logs | Sales | Admin

New Delete Export Print

1 - Pledge(s)

ID	Pledge Date	Total Amount	Amount Received	Written Off	Amount Open	Strength	Number Scheduled Payments	First Due Date	Last Due Date	Event
76	5/8/2017	1,200,000.00	100,000.00	.00	1,100,000.00	Hard Give	12	7/1/2017	6/1/2018	2017 - Pledge Drive (Direct Mail)
		1,200,000.00	100,000.00	.00	1,100,000.00					

Summary | **Payment Schedule** | Specific Instructions

Export Print Pivot Delete Pmt Applications

(12) Scheduled Payment(s)

Delete	ID	Due Date	Pledge Amount	Amount Received	Written Off	Amount Open	Date Pmt Entered
Delete	799	7/1/2017	100,000.00	100,000.00	.00	.00	7/5/2017
Delete	800	8/1/2017	100,000.00	.00	.00	100,000.00	
Delete	801	9/1/2017	100,000.00	.00	.00	100,000.00	
Delete	802	10/1/2017	100,000.00	.00	.00	100,000.00	
Delete	803	11/1/2017	100,000.00	.00	.00	100,000.00	
Delete	804	12/1/2017	100,000.00	.00	.00	100,000.00	
Delete	805	1/1/2018	100,000.00	.00	.00	100,000.00	
Delete	806	2/1/2018	100,000.00	.00	.00	100,000.00	
Delete	807	3/1/2018	100,000.00	.00	.00	100,000.00	
Delete	808	4/1/2018	100,000.00	.00	.00	100,000.00	
Delete	809	5/1/2018	100,000.00	.00	.00	100,000.00	
Delete	810	6/1/2018	100,000.00	.00	.00	100,000.00	

You can verify the payment was applied in the donor's record card.

The next section will show you how to search for donors who have an **outstanding pledge** and how to view the **details** of the **pledges** in the respective lists.

#3 – Running Reports for Donors with Unpaid Pledges, and Pledge Detail Reports

View Donors with an Outstanding Pledge in the Contacts (Donors/Voters) List

Running a search query for donors with an open pledge.

The screenshot shows the TrailBlazer software interface. On the left is a 'Tasks' sidebar with 'Contact' selected. The top navigation bar includes 'Search', 'Reset', 'New', and 'Contacts'. The main window has tabs for 'Pledge', 'Event', 'Sales', 'Log', 'Admin', and 'SQL'. Search filters include 'Date Range', 'Event', and 'Open Pledges Only' (checked). Below the filters is a table of 40 records.

results

ID	Last Name	First Name	Street	Street 2	City	State	Zip Code	Home Phone	Email
2	Aagard	Martha	4629 York Ave S		Minneapolis	MN	55410	(612) 920-9217	Martha@Aagard.com
14	Abdulali	Quaid	3408 Stevens Ave S	Apt 5	Minneapolis	MN	55408	(612) 821-9310	
36	Adams	Elizabeth	634 Franklin St	Apt B306-4	Winona	MN	55987	(641) 832-8621	
210	Anderson	Susan	15106 Yellow Pine St NW		Andover	MN	55304	(612) 436-8624	Susan@Anderson.com
5043	Madsen	Alf	728 1st Ave NW		Grand Rapids	MN	55744	(218) 326-9310	Alf@Madsen.com
8968	Wilson	David	12345 Jonquil St NW		Coon Rapids	MN	55433	(763) 427-9419	David@Wilson.com
9280		Towne Bank	123 E Main		Norfolk	VA	23510		
9418	Smith	Angus	2610 University Ave		St Paul	MN	55114	(612) 287-9546	angus@smwith.com
9449	LeMaster	Jea	100 Main St E		Highland	CA	92346		jea@lemaster.com
9452	Boyce	Colleen	75 5th St W		St Paul	MN	55102	(111) 111-2222	colleen@boyce.com
9461	Hamilton	Linda	7865 Audie Brook Dr		Spring Hill	FL	34608	(123) 132-1321	linda@hamilton.com
9477	Snook	Donita	45678 72nd Ave E		Urbandale	IA	50322		Donita@Snook.com
10467	Sundet Wolf	Paula	503 Caribou Trl		Lutsen	MN	55612	(218) 663-7854	paula@sundetwolf.com
10956	Amos	Daniel	1267 College Ave		Braman	OK	74632	(321) 321-3213	amosdg@gmail.com

View Details (Line Items) for Pledges in the ‘Pledges, Details’ List

How to Create a Pledge, Apply Payments (Donations) to Open Pledges, and Run Reports for Outstanding Pledges

Running a search query for the details of all unpaid pledges.

results

details

ID	Last Name	First Name	Pledge Strength	Date Due	Pledge Amount	Amount Received	Amount Written Off	Amount Open	Date Paid	Event
308	LeMaster	Jea	Hard Give	5/11/2012	50.00	.00	.00	50.00		
456	Lesniak	Karen	Hard Give	5/31/2012	25.00	.00	.00	25.00		
755	Amos	Daniel	Hard Give	6/1/2012	100.00	.00	.00	100.00		
569	Barrows	Alicia	Hard Give	6/1/2012	100.00	.00	.00	100.00		
533	Harrington	Cheryl	Hard Give	6/1/2012	25.00	.00	.00	25.00		
497	Nathe	Anthony	Hard Give	6/1/2012	25.00	.00	.00	25.00		
427	Boyce	Colleen	Hard Give	6/2/2012	25.00	.00	.00	25.00		
309	LeMaster	Jea	Hard Give	6/11/2012	50.00	.00	.00	50.00		
445	Kangas	Marjorie	Hard Give	6/16/2012	30.00	.00	.00	30.00		
389	Griffith	Mary	Hard Give	6/30/2012	250.00	.00	.00	250.00		2012 - Capital Camp...
457	Lesniak	Karen	Hard Give	6/30/2012	25.00	.00	.00	25.00		
450	Pethel	Jeana	Hard Give	6/30/2012	125.00	.00	.00	125.00		
756	Amos	Daniel	Hard Give	7/1/2012	100.00	.00	.00	100.00		
570	Barrows	Alicia	Hard Give	7/1/2012	100.00	.00	.00	100.00		
534	Harrington	Cheryl	Hard Give	7/1/2012	25.00	.00	.00	25.00		
498	Nathe	Anthony	Hard Give	7/1/2012	25.00	.00	.00	25.00		
428	Boyce	Colleen	Hard Give	7/2/2012	25.00	.00	.00	25.00		
310	LeMaster	Jea	Hard Give	7/11/2012	50.00	.00	.00	50.00		
458	Lesniak	Karen	Hard Give	7/31/2012	25.00	.00	.00	25.00		
757	Amos	Daniel	Hard Give	8/1/2012	100.00	.00	.00	100.00		

View Donors with Outstanding Pledges and a Summary of their Pledge in the ‘Pledges’ List

How to Create a Pledge, Apply Payments (Donations) to Open Pledges, and Run Reports for Outstanding Pledges

Running a query for all donors with outstanding pledges. This list will display the sum total details.

details

ID	Last Name	First Name	Pledge Strength	Pledge Date	Pledge Amount	Amount Received	Amount Written Off	Amount Open	Number Scheduled Payments	First Due Date	Last Due Date
77	Aagard	Martha	Hard Give	5/8/2017	2,500.00	.00	.00	2,500.00	5	1/1/2018	
76	Buffett	Warren	Hard Give	5/8/2017	1,200,000.00	100,000.00	.00	1,100,000.00	12	7/1/2017	
75	Daigle	Jazz	Hard Give	2/12/2016	5,000.00	.00	.00	5,000.00	5	1/1/2017	
72	Amos	Daniel	Hard Give	5/24/2012	1,200.00	.00	.00	1,200.00	12	6/1/2012	
71	Crawford	Shawn	Hard Give	5/3/2012	2,800.00	900.00	.00	1,900.00	4	12/31/2012	12/31/2012
70	Hockaday	James	Hard Give	4/9/2012	10,000.00	.00	.00	10,000.00	5	12/31/2012	12/31/2012
67	Woolverton	Jeffrey	Hard Give	2/9/2012	2,400.00	1,100.00	.00	1,300.00	24	2/1/2012	
65	Mercer	Cyrstal	Hard Give	2/6/2012	600.00	300.00	.00	300.00	24	3/1/2012	
64	Wilson	David	Hard Give	2/3/2012	2,400.00	300.00	.00	2,100.00	24	7/1/2012	
62	Barrows	Alicia	Hard Give	1/25/2012	3,600.00	400.00	.00	3,200.00	36	2/1/2012	
61	Harrington	Cheryl	Hard Give	1/23/2012	900.00	100.00	.00	800.00	36	2/1/2012	
60	Nathe	Anthony	Hard Give	1/18/2012	900.00	100.00	.00	800.00	36	2/1/2012	
59	Pope	Tommy	Hard Give	1/9/2012	5,000.00	475.00	.00	4,525.00	5	12/31/2013	12/31/2013
58	Lesniak	Karen	Hard Give	1/9/2012	900.00	100.00	.00	800.00	36	1/31/2012	12/31/2012
57	Pethel	Jeana	Hard Give	12/30/2011	500.00	250.00	.00	250.00	4	12/30/2011	9/30/2011
56	Kangas	Marjorie	Hard Give	12/16/2011	100.00	30.00	.00	70.00	4	3/16/2012	12/16/2011
55	Hoff	Julie	Hard Give	6/29/2011	5,000.00	1,000.00	.00	4,000.00	5	12/31/2011	12/31/2011
54	Boyce	Colleen	Hard Give	6/2/2011	600.00	300.00	.00	300.00	24	6/2/2011	
53	Fucini-Sedesky	Bianca	Hard Give	4/25/2011	10,000.00	2,000.00	.00	8,000.00	5	12/31/2011	12/31/2011

Checkout the **Related Resources** below for many other useful **articles** and **videos** related to this topic.



Trail Blazer

- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources

Related Resources

Article: [Enter Contributions](#)

Article: [Contribution Year-End Report](#)

Article: [Delete a Contribution](#)

Article: [Matching Contributions](#)

Article: [Importing Pledges – Best Practices](#)

Video: [Contribution – Apply Contribution Payments to Open Pledges](#)

Video: [Getting Started 106a – Entering contributions \(NON PROFIT ONLY\)](#)

Video: [Pledges – Close out a pledge that has payments on it](#)

Video: [Getting Started 102 Beginning Queries – Nonprofit](#)

Trail Blazer Live Support

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🐦 Twitter: <https://twitter.com/trailblazersoft>

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[Click here](#) to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.

* After registering you'll receive a confirmation email with the instructions for how to log into the [GoToMeeting](#) session where we host our live interactive trainings.

* This service is included in your contract.