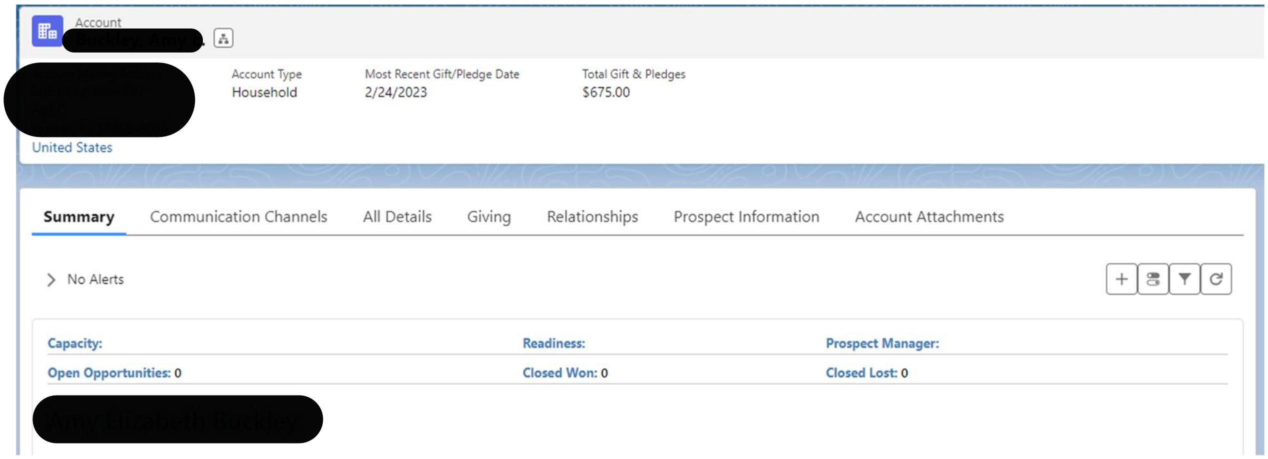
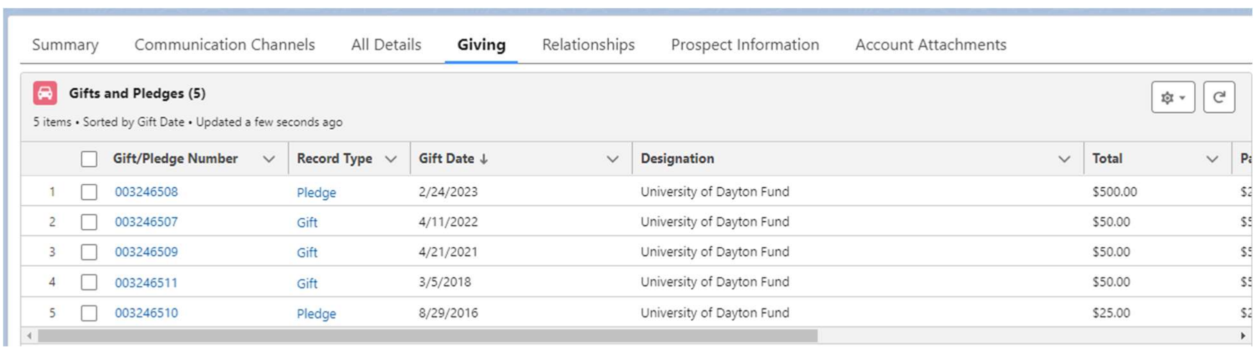
General Navigation

1. Open an Account you want to review.



2. Click on the Giving tab and click View All.



	Gift/Pledge Number	Record Type	Gift Date ↓	Designation	Total
1	003246508	Pledge	2/24/2023	University of Dayton Fund	$500.00
2	003246507	Gift	4/11/2022	University of Dayton Fund	$50.00
3	003246509	Gift	4/21/2021	University of Dayton Fund	$50.00
4	003246511	Gift	3/5/2018	University of Dayton Fund	$50.00
5	003246510	Pledge	8/29/2016	University of Dayton Fund	$25.00

3. In the screenshot below, you will see all the gifts and pledges associated with this account. The Total column shows the total of each pledge or gift.

	Gift/Pledge Number	Record Type	Gift Date ↓	Designation	Total	Payments	Soft Credits	Pledge Balance	Anonymous	Matched?
1	003246508	Pledge	2/24/2023	University of Dayton Fund	$500.00	$200.00	$0.00	$300.00		
2	003246507	Gift	4/11/2022	University of Dayton Fund	$50.00	$50.00	$0.00	$0.00		
3	003246509	Gift	4/21/2021	University of Dayton Fund	$50.00	$50.00	$0.00	$0.00		
4	003246511	Gift	3/5/2018	University of Dayton Fund	$50.00	$50.00	$0.00	$0.00		
5	003246510	Pledge	8/29/2016	University of Dayton Fund	$25.00	$25.00	$0.00	$0.00		

4. The Payments column will show you the payments that have been made against the respective pledge or gift.

Accounts [redacted]

Gifts an[redacted]

5 items • Sorted by Gift Date • Updated a few seconds ago

	Gift/Pledge Number	Record Type	Gift Date ↓	Designation	Total	Payments	Soft Credits	Pledge Balance	Anonymous	Matched?
1	003246508	Pledge	2/24/2023	University of Dayton Fund	$500.00	$200.00	$0.00	$300.00		
2	003246507	Gift	4/11/2022	University of Dayton Fund	$50.00	$50.00	$0.00	$0.00		
3	003246509	Gift	4/21/2021	University of Dayton Fund	$50.00	$50.00	$0.00	$0.00		
4	003246511	Gift	3/5/2018	University of Dayton Fund	$50.00	$50.00	$0.00	$0.00		
5	003246510	Pledge	8/29/2016	University of Dayton Fund	$25.00	$25.00	$0.00	$0.00		

5. The Pledge Balance column shows the balance remaining on the respective pledge. In this example, the donor has a $300 balance after paying $200 on her $500 pledge.

Account[redacted]

Gifts an[redacted]

5 items • Sorted by Gift Date • Updated a few seconds ago

	Gift/Pledge Number	Record Type	Gift Date ↓	Designation	Total	Payments	Soft Credits	Pledge Balance	Anonymous	Matched?
1	003246508	Pledge	2/24/2023	University of Dayton Fund	$500.00	$200.00	$0.00	$300.00		
2	003246507	Gift	4/11/2022	University of Dayton Fund	$50.00	$50.00	$0.00	$0.00		
3	003246509	Gift	4/21/2021	University of Dayton Fund	$50.00	$50.00	$0.00	$0.00		
4	003246511	Gift	3/5/2018	University of Dayton Fund	$50.00	$50.00	$0.00	$0.00		
5	003246510	Pledge	8/29/2016	University of Dayton Fund	$25.00	$25.00	$0.00	$0.00		

6. The soft credit column identifies any gifts a third party pays on behalf of the donor (like a donor-advised fund, or family foundation).

Accounts [redacted]

Gifts and Pledges

5 items • Sorted by Gift Date • Updated a few seconds ago

	Gift/Pledge Number	Record Type	Gift Date ↓	Designation	Total	Payments	Soft Credits	Pledge Balance	Anonymous	Matched?
1	003246508	Pledge	2/24/2023	University of Dayton Fund	$500.00	$200.00	$0.00	$300.00		
2	003246507	Gift	4/11/2022	University of Dayton Fund	$50.00	$50.00	$0.00	$0.00		
3	003246509	Gift	4/21/2021	University of Dayton Fund	$50.00	$50.00	$0.00	$0.00		
4	003246511	Gift	3/5/2018	University of Dayton Fund	$50.00	$50.00	$0.00	$0.00		
5	003246510	Pledge	8/29/2016	University of Dayton Fund	$25.00	$25.00	$0.00	$0.00		

7. Click on the transaction number of the Gift/Pledge Number to find further information.

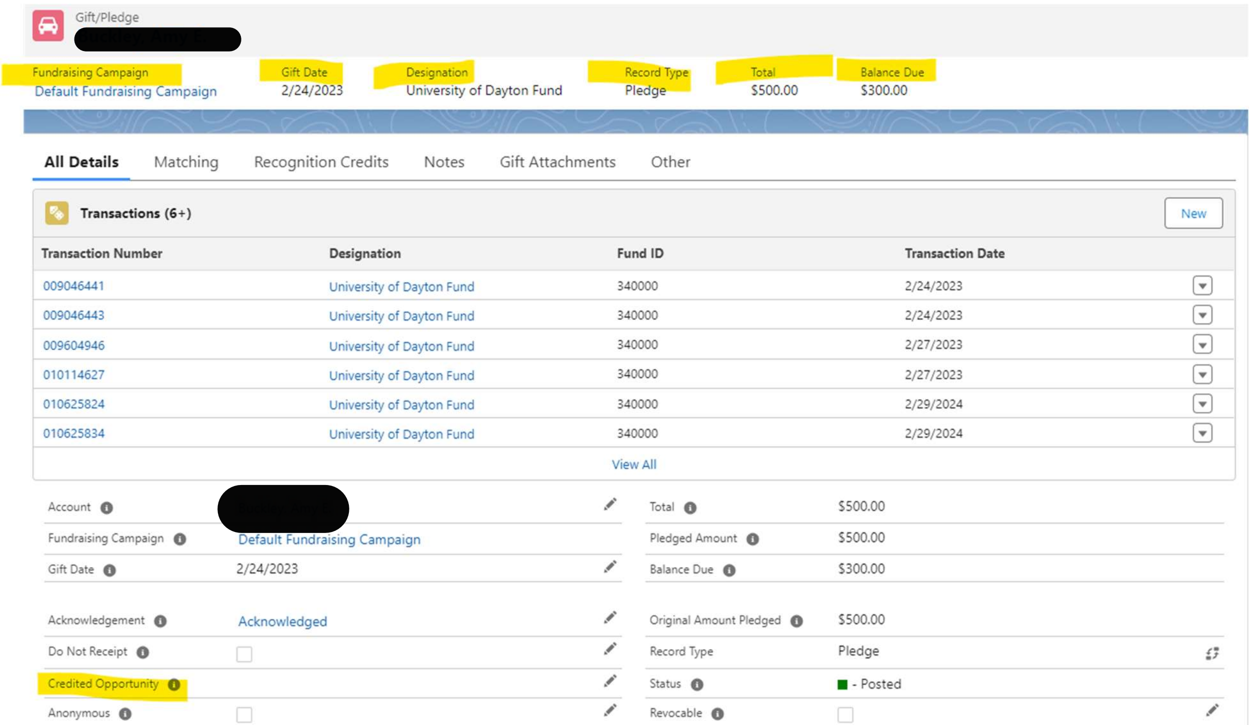
Account[redacted]

Gifts and Pledges

5 items • Sorted by Gift Date • Updated a few seconds ago

	Gift/Pledge Number	Record Type	Gift Date ↓	Designation	Total	Payments	Soft Credits	Pledge Balance	Anonymous	Matched?
1	003246508	Pledge	2/24/2023	University of Dayton Fund	$500.00	$200.00	$0.00	$300.00		
2	003246507	Gift	4/11/2022	University of Dayton Fund	$50.00	$50.00	$0.00	$0.00		
3	003246509	Gift	4/21/2021	University of Dayton Fund	$50.00	$50.00	$0.00	$0.00		
4	003246511	Gift	3/5/2018	University of Dayton Fund	$50.00	$50.00	$0.00	$0.00		
5	003246510	Pledge	8/29/2016	University of Dayton Fund	$25.00	$25.00	$0.00	$0.00		

8. In the header of the account, you can see the appeal code (Fundraising Campaign), Gift Date, Designation, Record Type, Total of the pledge or gift, and Balance Due. While in the lower view, you find the Credited Opportunity (if there is one).



9. If you scroll down the page, you can find more details about the respective pledge or gift, such as:
   a. In the Notes and Comments there will be information regarding the pledge or gift. The example below records a note from Give Campus about a tribute.
   b. Soft Credit Transaction will show soft credit related to this donation.
   c. Transactions will display all transactions associated with the gift.
   d. Tributes will show any tributes linked with this pledge or gift.

Notes and Comments (1)

Note/Comment Number	Amount	Note	Type
1975847		In Memory of Steven Buckley class of '78	GiveCampus Call Comments

View All

Quid Pro Quos (0)

Receipts (0)

Recurring Gifts (0)

Soft Credit Transactions (0)

Solicitation Credits (0)

Transactions (1)

Transaction Number	Designation	Fund ID	Transaction Date
009046440	University of Dayton Fund	340000	4/11/2022

View All

Tributes (1)

Tribute Name	Type	Honoree Account
053771	In memory of	Buckley, Steven R.

View All

10. Moving back to the top of the page, click View All to see all transactions associated with this pledge. The Transaction Type will identify whether it is a pledge or gift payment.

by Balance • Updated 7 minutes ago

Designation	Fund ID	Transaction Date	Gift/Pledge Date	Amount	Balance ↑	Date Due	Source of ...	Transaction Type
University of Dayton Fund	340000	2/24/2023	2/24/2023	$100.00	$0.00	2/24/2023		Pledge
University of Dayton Fund	340000	2/24/2023	2/24/2023	$100.00	$0.00	2/24/2024		Pledge
University of Dayton Fund	340000	2/27/2023	2/27/2023	$100.00	$0.00			Payment
University of Dayton Fund	340000	2/27/2023	2/27/2023	-$100.00	$0.00			Pledge
University of Dayton Fund	340000	2/29/2024	2/29/2024	$100.00	$0.00	2/24/2024	Give Campus	Payment
University of Dayton Fund	340000	2/29/2024	2/29/2024	-$100.00	$0.00	2/24/2024	Give Campus	Pledge
University of Dayton Fund	340000	2/24/2023	2/24/2023	$100.00	$100.00	2/24/2026		Pledge
University of Dayton Fund	340000	2/24/2023	2/24/2023	$100.00	$100.00	2/24/2027		Pledge
University of Dayton Fund	340000	2/24/2023	2/24/2023	$100.00	$100.00	2/24/2025		Pledge

11. The screenshot below shows that two pledge payments were made by Check (Source of Data). Other Sources of Data can include Wire, Cash, and Credit Card/Give Campus. In this case, the Check came from a donor-advised fund which is why the donor received Soft Credit.

Balance • Updated a few seconds ago

Designation	Fund ID	Transaction Date	Gift/Pledge Date	Amount	Balance ↑	Date Due	Source of ...	Transaction Type
Ron Burrows Scholarship for Accounting Students	700455	5/17/2024	5/17/2024	$2,500.00	$0.00	5/31/2024	Pledge	Pledge
Ron Burrows Scholarship for Accounting Students	700455	5/17/2024	5/17/2024	$2,500.00	$0.00	5/31/2025	Pledge	Pledge
Ron Burrows Scholarship for Accounting Students	700455	5/20/2024	5/20/2024	$2,500.00	$0.00	5/31/2024	Checks	Soft Credit
Ron Burrows Scholarship for Accounting Students	700455	5/20/2024	5/20/2024	-$2,500.00	$0.00	5/31/2024	Checks	Pledge
Ron Burrows Scholarship for Accounting Students	700455	5/20/2024	5/20/2024	$2,500.00	$0.00	5/31/2025	Checks	Soft Credit
Ron Burrows Scholarship for Accounting Students	700455	5/20/2024	5/20/2024	-$2,500.00	$0.00	5/31/2025	Checks	Pledge

12. A payment is identified by a "–" sign. In this case, -$2,500 are the pledge payments. The pledge amount shows a balance of $0.

Fund ID	Transaction Date	Gift/Pledge Date	Amount	Balance ↑	Date Due	Source of ...	Transaction Type
700455	5/17/2024	5/17/2024	$2,500.00	$0.00	5/31/2024	Pledge	Pledge
700455	5/17/2024	5/17/2024	$2,500.00	$0.00	5/31/2025	Pledge	Pledge
700455	5/20/2024	5/20/2024	$2,500.00	$0.00	5/31/2024	Checks	Soft Credit
700455	5/20/2024	5/20/2024	-$2,500.00	$0.00	5/31/2024	Checks	Pledge
700455	5/20/2024	5/20/2024	$2,500.00	$0.00	5/31/2025	Checks	Soft Credit
700455	5/20/2024	5/20/2024	-$2,500.00	$0.00	5/31/2025	Checks	Pledge

13. Now, let's click on a Transaction Number.

Gifts and Pledges > 003518053

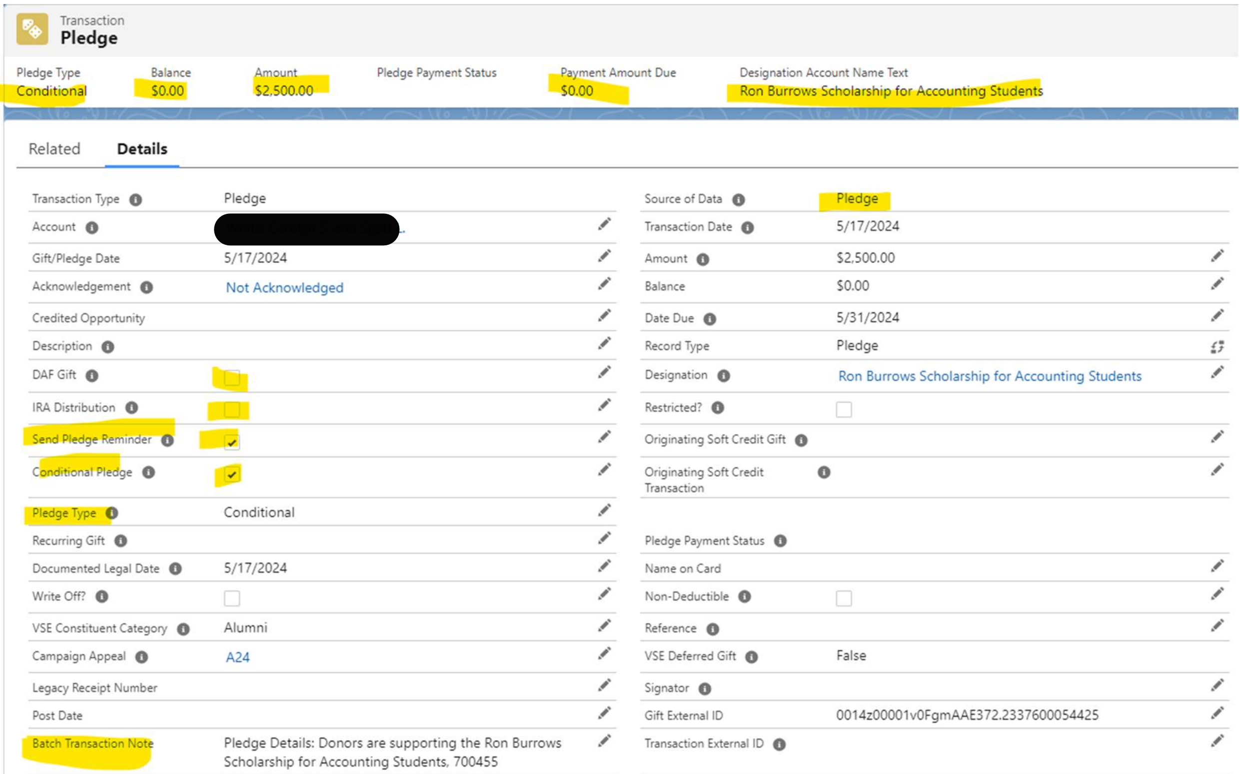
Transactions

6 items • Sorted by Balance • Updated 9 minutes ago

	Transaction Number ↑	Designation
1	010641609	Ron Burrows Scholarship for Accounting Students
2	010641610	Ron Burrows Scholarship for Accounting Students
3	010641797	Ron Burrows Scholarship for Accounting Students
4	010641798	Ron Burrows Scholarship for Accounting Students
5	010641799	Ron Burrows Scholarship for Accounting Students
6	010641800	Ron Burrows Scholarship for Accounting Students

14. The header displays the type of donation (in this case it is a pledge), the Balance of this installment, the Amount paid, Payment Amount Due, and Designation. In the details section, more information can be identified:

   a. Source of Data: how the gift in this batch was processed: Check, Wire, Credit Card, Give Campus, Pledge, or Payroll Deduction.
   b. QCDs (IRA Distribution) and DAF Gifts are indicated by a check mark in the corresponding box.
   c. Pledge type: Conditional or Unconditional. If it is conditional the checkbox will also be marked.
   d. Send Pledge Reminders is checked if we wish to send them.
   e. Batch Transaction Note is present if and when a note is entered in a batch to capture some important information.



Transaction
Pledge

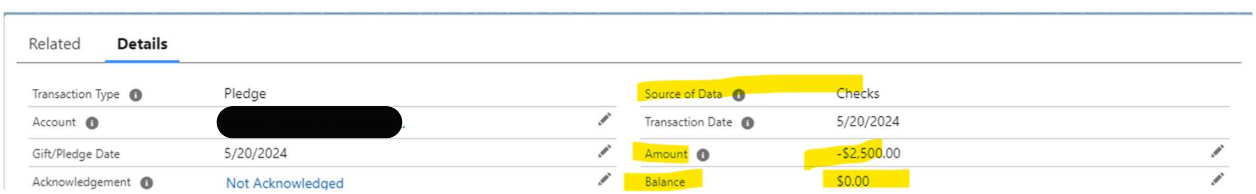
Pledge Type	Balance	Amount	Pledge Payment Status	Payment Amount Due	Designation Account Name Text
Conditional	$0.00	$2,500.00		$0.00	Ron Burrows Scholarship for Accounting Students

Related **Details**

Transaction Type	Pledge	Source of Data	Pledge
Account	[redacted]	Transaction Date	5/17/2024
Gift/Pledge Date	5/17/2024	Amount	$2,500.00
Acknowledgement	Not Acknowledged	Balance	$0.00
Credited Opportunity		Date Due	5/31/2024
Description		Record Type	Pledge
DAF Gift	☐	Designation	Ron Burrows Scholarship for Accounting Students
IRA Distribution	☐	Restricted?	☐
Send Pledge Reminder	☑	Originating Soft Credit Gift	
Conditional Pledge	☑	Originating Soft Credit Transaction	
Pledge Type	Conditional		
Recurring Gift		Pledge Payment Status	
Documented Legal Date	5/17/2024	Name on Card	
Write Off?	☐	Non-Deductible	☐
VSE Constituent Category	Alumni	Reference	
Campaign Appeal	A24	VSE Deferred Gift	False
Legacy Receipt Number		Signator	
Post Date		Gift External ID	0014z00001v0FgmAAE372.2337600054425
Batch Transaction Note	Pledge Details: Donors are supporting the Ron Burrows Scholarship for Accounting Students, 700455	Transaction External ID	

Please note: the information varies if you are looking at the pledge or a respective payment.

For instance, if you are looking at the payment of the pledge, the Source of Data will capture the type of payment received. In this case, a Check.



Related **Details**

Transaction Type	Pledge	Source of Data	Checks
Account	[redacted]	Transaction Date	5/20/2024
Gift/Pledge Date	5/20/2024	Amount	-$2,500.00
Acknowledgement	Not Acknowledged	Balance	$0.00