



## Submitting CSA Pledges/Payments to the Foundation.

- A. **Import payments from your online giving vendor** to ensure credit card payments are properly credited.
- B. **(optional) Check for errors:** If errors exist, you will receive an email at 9 a.m. but you can check anytime:
  - **Contributions > Pledges > choose View: Fix CSA email reminders no email:** This view shows people who have chosen to receive email reminders however the email address is missing. Please enter an email or change their **Pledge Receipt Frequency**. See **Pledge Entry** instructions found on <https://www.eriecd.org/mpt2.html> for instructions on changing the **Pledge Receipt Frequency**.
  - **Contributions > Pledges > choose View: Fix Deceased with pledge - CSA:** If you see someone with an "Active" pledge, run the **Deceased Person Tool (DPT)**. See **Deceased Person Tool** instructions found on <https://www.eriecd.org/mpt2.html>. Double check the pledge after you run the DPT to make sure the pledge was changed to **discontinued**.
  - **Contributions > Pledges > choose View: Fix Pledge Receipt Frequency Pledge Receipt Type:** This view shows people who have a blank **Pledge Receipt Type** or **Pledge Receipt Frequency** or possibly both. See **Pledge Entry** instructions found on <https://www.eriecd.org/mpt2.html> for instructions on changing the **Pledge Receipt Frequency & Type** which you can use to update those two keywords.
- C. **(Optional) Make a final review of all reminders.** The billing software will send reminders according to the **Pledge Receipt Frequency** so not everyone in this list will receive a reminder this month. For example, if they've chosen May/November, they won't get a reminder in July but they will still show up on this view.
  1. Click **Contributions > Pledges > choose the view: CSA Review this year** to see everyone with an outstanding balance.
  2. If you want to see what the reminder export looks like for example one line per family)
    - a. Click the **empty check box** at the bottom of the list to select all records.
    - b. Click the **Reports** button in the upper right corner.
    - c. Choose **Selected Pledge Mail Merge – CSA** at the bottom of the list. A small window will open.
    - d. Click the button that looks like a **diskette** and choose **Excel**.
      - In Firefox you might get the option to open it in Excel or to save the file to your desktop
      - In Chrome the file name may appear in the lower right corner
      - In Edge, the file name may appear in the upper right corner.

### Printing the equivalent of the Pledge Drive Status Report

1. Click **Advance Navigation** button at the bottom of the left task pane.
2. Click **Contributions** and choose **CSA Campaigns**.
3. Check mark the campaign for which you would like to print a report
4. Click the **report** button.
5. Choose **Selected Campaign Donor Summary - Erie**.
6. Both the **Unpledged From** and the **Pledged From** fields should read **2/1/\_\_\_** Current CSA year). You can ignore the dates that get entered in the **Unpledged To** and the **Pledged To** fields  
**If you opened your CSA earlier than 2/1/\_\_\_ you will have to use the date of your first donation.**
7. Click **View Report** then click the **diskette** button and choose **PDF**. Depending on how PDFs open on your computer there could be a button to click in lower left or upper right corner.