

2012 Summer Release

Automated Pledge Recalculation

Platform Luminate CRM

Configuration Automatically visible. No setup required.

Our team is committed to helping you get the most out of every relationship and inspire your creativity to deliver engaging experiences for your constituents so you can do even more for your mission. The Summer 2012 release of Convio Luminate[™] is packed with enhancements designed to connect more people to your cause, enhance the user's experience, allow you to better measure and test your strategies, and offer new ways to deliver web-based content and leverage our open platform – all while making optimal use of your staff's valuable time.

This document describes the feature "Automated Pledge Recalculation", explains how to configure and use it, and offers tips for taking full advantage of its benefits. Please visit the <u>release resource center</u> to read more about the exciting features in this release.

OVERVIEW

Prior to this release, if a donor overpaid or underpaid a pledge payment, administrators had to manually adjust the payment schedule for the gift. For example, let's say a donor has pledged \$10.00 a month for six months. On the third month, they send in a check for \$20.00 instead of \$10.00. Should the next payment be cancelled and then resume two months later? Should the next payment resume as usual, but cancel the last payment? Or should the remaining number of payments be reduced by an equal amount totaling \$10.00?

The Luminate CRM Automatic Pledge Recalculation feature will automatically recalculate the balance and remaining payment schedule during gift entry depending on what settings you have chosen. For example, you can configure Pledge Recalculation so that overpayments are deducted from the next installment or so the deduction is distributed among all the remaining installments. There are similar settings for underpayments as well.

FEATURES AND BENEFITS

The system can automatically recalculate the remaining payments when donors overpay or underpay. The system also includes an improved interface for manually editing the entire payment schedule when the donors payment schedule is not something that can be set on an exact interval.

Features

 Organizations can configure the default behavior for how the system should recalculate the outstanding pledge payment schedule when a donor overpays or underpays their pledge payment compared to the current payment due amount.

Benefits

- The system will automatically recalculate the outstanding pledge payment schedule based on the system defaults for overpayment.
- The system will automatically recalculate the outstanding pledge payment schedule based on the system defaults for underpayment.
- Organizations can now choose from a number of options to automatically create the adjusted, outstanding, scheduled payments for underpayment and overpayment based on organization business process rules.
- Organizations can manually edit the payment schedule for a donor when their payment needs fall outside the default payment recalculation rule.

COMMON SCENARIOS

When a donor overpays or underpays a pledge installment, the remaining pledge payments are recalculated according to how you have configured the system. For example if a donor overpays, you can deduct the overpayment amount from the next payment, or deduct it evenly from all the remaining payments.

The following lists the different ways you can configure how pledge installments are recalculated when a donor overpays or underpays:

Default Overpayment Behavior

- Evenly Allocate Overpayment Among Remaining Payments
- Deduct Payment from the Next Installment
- Deduct Payment from the Final Installment

Default Underpayment Behavior

- Evenly Allocate Underpayment Among Remaining Payments
- Add Payment to the Next Installment
- Add the Remaining Balance to a New, Subsequent Payment
- Add New Installment to the End of the Schedule

Default Overpayment Behavior

Javier Bates committed to give ABC Health \$1200 in 2012 fulfilled through \$100 payments. Each \$100 Payment is made via a check that Javier sends in each month. His original payment schedule for a \$1200 annual pledge is as follows:

(nations avier Bates \$1200.00 Pledge			Printable View Help for t
Pledge: J	avier Bates \$1200.00 Pledge			
Action	Donation Name	Account Name	Stage	Amount Close Date 1
Edit Del	Javier Bates \$1200.00 Pledge Installment 1 of 12	Javier Bates Household	Pending Installment	\$100.00 1/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 2 of 12	Javier Bates Household	Pending Installment	\$100.00 2/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 3 of 12	Javier Bates Household	Pending Installment	\$100.00 3/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 4 of 12	Javier Bates Household	Pending Installment	\$100.00 4/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 5 of 12	Javier Bates Household	Pending Installment	\$100.00 5/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 6 of 12	Javier Bates Household	Pending Installment	\$100.00 6/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 7 of 12	Javier Bates Household	Pending Installment	\$100.00 7/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 8 of 12	Javier Bates Household	Pending Installment	\$100.00 8/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 9 of 12	Javier Bates Household	Pending Installment	\$100.00 9/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 10 of 12	Javier Bates Household	Pending Installment	\$100.00 10/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 11 of 12	Javier Bates Household	Pending Installment	\$100.00 11/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 12 of 12	Javier Bates Household	Pending Installment	\$100.00 12/1/2012
		Show me fewer 🔺 records per list page		

The following scenarios illustrate how Luminate CRM recalculates the payment schedule if Javier overpays. The payments are recalculated in different ways depending on how the **Pledge Installment Recalculation Defaults** page is configured. The options are **Evenly Allocate**, **Deduct from Next Installment**, and **Deduct from Final Installment**.

If you don't want the pledge installments to be recalculated, you can click **Disabled**.

Evenly Allocate

In January Javier sent us \$100, in February he sent us \$150 when only \$100 was due for this month. If you have selected **Evenly Allocate**, overpayment amounts are deducted evenly from the remaining pledge installments.

To evenly allocate a pledge payment that has been overpaid:

1. In the Pledge Installment Recalculation Details page, select Evenly Reallocate.



The overpayment is deducted from the remaining installments resulting in \$95.00 payments for the remaining installments.

🕑 Ja	avier Bates \$1200.00 Pledge avier Bates \$1200.00 Pledge		Printable	View Help) for this Page	0
Action	Donation Name	Account Name	Stage	Amount	Close Date	٠
Edit Del	Javier Bates \$1200.00 Pledge Installment 1 of 12	Javier Bates Household	Received	\$100.00	1/1/2012	
Edit Del	Javier Bates \$1200.00 Pledge Installment 2 of 12	Javier Bates Household	Pending Installment	\$150.00	2/1/2012	
Edit Del	Javier Bates \$1200.00 Pledge Installment 3 of 12	Javier Bates Household	Pending Installment	\$95.00	3/1/2012	
Edit Del	Javier Bates \$1200.00 Pledge Installment 4 of 12	Javier Bates Household	Pending Installment	\$95.00	4/1/2012	
Edit Del	Javier Bates \$1200.00 Pledge Installment 5 of 12	Javier Bates Household	Pending Installment	\$95.00	5/1/2012	
Edit Del	Javier Bates \$1200.00 Pledge Installment 6 of 12	Javier Bates Household	Pending Installment	\$95.00	6/1/2012	
Edit Del	Javier Bates \$1200.00 Pledge Installment 7 of 12	Javier Bates Household	Pending Installment	\$95.00	7/1/2012	
Edit Del	Javier Bates \$1200.00 Pledge Installment 8 of 12	Javier Bates Household	Pending Installment	\$95.00	8/1/2012	
Edit Del	Javier Bates \$1200.00 Pledge Installment 9 of 12	Javier Bates Household	Pending Installment	\$95.00	9/1/2012	Γ
Edit Del	Javier Bates \$1200.00 Pledge Installment 10 of 12	Javier Bates Household	Pending Installment	\$95.00	10/1/2012	
Edit Del	Javier Bates \$1200.00 Pledge Installment 11 of 12	Javier Bates Household	Pending Installment	\$95.00	11/1/2012	
Edit Del	Javier Bates \$1200.00 Pledge Installment 12 of 12	Javier Bates Household	Pending Installment	\$95.00	12/1/2012	

Deduct Payment from the Next Installment

If you have selected **Deduct Payment from Next Installment(s)**, the overpayment amount is deducted from the next installment. If the overpayment amount is larger than the next installment, it will be deducted from subsequent payments until it is fully applied (this may result in the pledged being fully paid earlier than initially scheduled). In Javier's case, his February payment is reduced to \$50.00 and the payments after that remain the same.

1. In the Pledge Installment Recalculation Details page, select Deduct from Next Installment.

Pledge Installment Recalculation Defaults
Configure how pledge installments are recalculated when a donor overpays or underpays.
Default overpayment behavior
© Evenly Reallocate
Evenly distribute the new, smaller balance across all remaining installments.
Deduct from next installment(s)
Fully deduct the overpayment amount from the next and each subsequent installment until fully applied, then resume the original schedule for all remaining installments.
Deduct from Final Installment(s)
Fully deduct the overpayment amount from the final and each prior installment until fully applied. This may allow the pledge to be fulfilled earlier than originally planned.
© Disabled
No default overpayment recalculation behavior.

The overpayment is deducted from the next installments, resulting in a \$50.00 March payment and the other installments remain the same.

Donations Javier Bates \$1200.00 Pledge Pledge: Javier Bates \$1200.00 Pledge A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All						
Action	Donation Name 🔹	Account Name	Stage	Amount Close Date		
Edit Del	Javier Bates \$1200.00 Pledge Installment 1 of 12	Javier Bates Household	Received	\$100.00 1/2/2012		
Edit Del	Javier Bates \$1200.00 Pledge Installment 2 of 12	Javier Bates Household	Received	\$150.00 2/1/2012		
Edit Del	Javier Bates \$1200.00 Pledge Installment 3 of 12	Javier Bates Household	Pending Installment	\$50.00 3/1/2012		
Edit Del	Javier Bates \$1200.00 Pledge Installment 4 of 12	Javier Bates Household	Pending Installment	\$100.00 4/1/2012		
Edit Del	Javier Bates \$1200.00 Pledge Installment 5 of 12	Javier Bates Household	Pending Installment	\$100.00 5/1/2012		
Edit Del	Javier Bates \$1200.00 Pledge Installment 6 of 12	Javier Bates Household	Pending Installment	\$100.00 6/1/2012		
Edit Del	Javier Bates \$1200.00 Pledge Installment 7 of 12	Javier Bates Household	Pending Installment	\$100.00 7/1/2012		
Edit Del	Javier Bates \$1200.00 Pledge Installment 8 of 12	Javier Bates Household	Pending Installment	\$100.00 8/1/2012		
Edit Del	Javier Bates \$1200.00 Pledge Installment 9 of 12	Javier Bates Household	Pending Installment	\$100.00 9/1/2012		
Edit Del	Javier Bates \$1200.00 Pledge Installment 10 of 12	Javier Bates Household	Pending Installment	\$100.00 10/1/2012		
Edit Del	Javier Bates \$1200.00 Pledge Installment 11 of 12	Javier Bates Household	Pending Installment	\$100.00 11/1/2012		
Edit Del	Javier Bates \$1200.00 Pledge Installment 12 of 12	Javier Bates Household	Pending Installment	\$100.00 12/1/2012		

Deduct Payment from the Last Installment

If you have selected **Deduct Payment from Last Installment(s)**, the overpayment amount is deducted from the last installment. If the overpayment amount is larger than the last installment, it will be deducted from the payment before the last payment until it is fully applied (this may result in the pledged being fully paid earlier than initially scheduled). Lets' say Javier pays \$225.00 in Feb. His December payment is removed from the payment schedule (he will only have 11 installments instead of 12), and his November payment is reduced to \$75.00.

1. In the Pledge Installment Recalculation Details page, select Deduct from Next Installment.

Pledge Installment Recalculation Defaults
Configure how pledge installments are recalculated when a donor overpays or underpays.
Default overpayment behavior
© Evenly Reallocate
Evenly distribute the new, smaller balance across all remaining installments.
Obduct from next installment(s)
Fully deduct the overpayment amount from the next and each subsequent installment until fully applied, then resume the original schedule for all remaining installments.
Deduct from Final Installment(s)
Fully deduct the overpayment amount from the final and each prior installment until fully applied. This may allow the pledge to be fulfilled earlier than originally planned.
© Disabled
No default overpayment recalculation behavior.

2. The overpayment is so large, that the final installment is removed, and the final payment is reduced to \$75.00. The pledge will be paid off in 11 installments now instead of 12.

Printable View Help for this Page Pledge: Javier Bates \$1200.00 Pledge					
Action	Donation Name	Account Name	Stage	Amount	Close Date 🔹
Edit Del	Javier Bates \$1200.00 Pledge Installment 1 of 12	Javier Bates Household	Received	\$100.00	1/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 2 of 12	Javier Bates Household	Received	\$225.00	2/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 3 of 11	Javier Bates Household	Pending Installment	\$100.00	3/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 4 of 11	Javier Bates Household	Pending Installment	\$100.00	4/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 5 of 11	Javier Bates Household	Pending Installment	\$100.00	5/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 6 of 11	Javier Bates Household	Pending Installment	\$100.00	6/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 7 of 11	Javier Bates Household	Pending Installment	\$100.00	7/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 8 of 11	Javier Bates Household	Pending Installment	\$100.00	8/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 9 of 11	Javier Bates Household	Pending Installment	\$100.00	9/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 10 of 11	Javier Bates Household	Pending Installment	\$100.00	10/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 11 of 11	Javier Bates Household	Pending Installment	\$75.00	11/1/2012
	Show me few	er 🔺 records per list page			

Default Underpayment Behavior

Javier Bates committed to give ABC Health \$1200 in 2012 fulfilled through \$100 payments. Each \$100 Payment is made via a check that Javier sends in each month. His original payment schedule for a \$1200 annual pledge is as follows:

(nations avier Bates \$1200.00 Pledge			Printable View Help for
	lavier Bates \$1200.00 Pledge			
Action	Donation Name	Account Name	Stage	Amount Close Date
Edit Del	Javier Bates \$1200.00 Pledge Installment 1 of 12	Javier Bates Household	Pending Installment	\$100.00 1/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 2 of 12	Javier Bates Household	Pending Installment	\$100.00 2/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 3 of 12	Javier Bates Household	Pending Installment	\$100.00 3/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 4 of 12	Javier Bates Household	Pending Installment	\$100.00 4/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 5 of 12	Javier Bates Household	Pending Installment	\$100.00 5/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 6 of 12	Javier Bates Household	Pending Installment	\$100.00 6/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 7 of 12	Javier Bates Household	Pending Installment	\$100.00 7/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 8 of 12	Javier Bates Household	Pending Installment	\$100.00 8/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 9 of 12	Javier Bates Household	Pending Installment	\$100.00 9/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 10 of 12	Javier Bates Household	Pending Installment	\$100.00 10/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 11 of 12	Javier Bates Household	Pending Installment	\$100.00 11/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 12 of 12	Javier Bates Household	Pending Installment	\$100.00 12/1/2012
		Show me fewer 🔺 records per list page		

The following scenarios illustrate how Luminate CRM recalculates the payment schedule if Javier underpays and installment. The payments are recalculated in different ways depending on how the **Pledge Installment Recalculation Defaults** page is configured. The options include **Evenly Allocate**, **Add to Next Installment(s)**, **Add Remaining Balance to New Subsequent Payment**, and **Add Installment to End of Schedule**.

Note: If you don't want the pledge installments to be recalculated, select Disabled.

Evenly Allocate

Let's say that Javier sends in a payment for \$50 when \$100 is due. If you have selected **Evenly Allocate**, the underpayment amount (\$50) will be added evenly to the remaining pledge installments.

To evenly allocate a pledge payment that has been overpaid:

1. In the **Pledge Installment Recalculation Details** page, select **Evenly Reallocate**.

Default underpayment behavior
Evenly Reallocate
Evenly distribute the new, larger balance across all remaining installments.
C Add to next installment(s)
Add an additional installment on the same date as the underpaid installment to the pledge for the remaining balance to the end of the pledge.
O Add remaining balance to new subsequent payment
Add the underpayment amount to a new subsequent installment. The new installment will be for the remaining balance and have the same close date as the updated installment.
O Add installment to end of schedule
Add an additional installment to the end of the pledge for the underpayment amount, extending the final pledge fulfillment date. The additional installment will inherit the schedule of the original pledge.
© Disabled
No default underpayment recalculation behavior.

The underpayment is added to the remaining installments resulting in \$116.67 payments for the remaining installments.

🕑 Ja	nations avier Bates \$1200.00 Pledge lavier Bates \$1200.00 Pledge		Printable	View Helj	p for this Page	e 🕜
Action	Donation Name	Account Name	Stage	Amount	Close Date	÷
Edit Del	Javier Bates \$1200.00 Pledge Installment 1 of 12	Javier Bates Household	Received	\$100.00	1/1/2012	
Edit Del	Javier Bates \$1200.00 Pledge Installment 2 of 12	Javier Bates Household	Received	\$50.00	2/1/2012	
Edit Del	Javier Bates \$1200.00 Pledge Installment 3 of 11	Javier Bates Household	Pending Installment	\$116.67	3/1/2012	1
Edit Del	Javier Bates \$1200.00 Pledge Installment 4 of 11	Javier Bates Household	Pending Installment	\$116.67	4/1/2012	
Edit Del	Javier Bates \$1200.00 Pledge Installment 5 of 11	Javier Bates Household	Pending Installment	\$116.67	5/1/2012	
Edit Del	Javier Bates \$1200.00 Pledge Installment 6 of 11	Javier Bates Household	Pending Installment	\$116.67	6/1/2012	
Edit Del	Javier Bates \$1200.00 Pledge Installment 7 of 11	Javier Bates Household	Pending Installment	\$116.67	7/1/2012	
Edit Del	Javier Bates \$1200.00 Pledge Installment 8 of 11	Javier Bates Household	Pending Installment	\$116.67	8/1/2012	
Edit Del	Javier Bates \$1200.00 Pledge Installment 9 of 11	Javier Bates Household	Pending Installment	\$116.67	9/1/2012	
Edit Del	Javier Bates \$1200.00 Pledge Installment 10 of 11	Javier Bates Household	Pending Installment	\$116.67	10/1/2012	/
Edit Del	Javier Bates \$1200.00 Pledge Installment 11 of 11	Javier Bates Household	Pending Installment	\$116.64	11/1/2012	1
	Show me fev	ver 🔺 records per list page				

2012 SUMMER RELEASE FEATURE SUMMARY > AUTOMATED PLEDGE RECALCULATION

Add Underpayment Amount to the Next Installment

If you have selected **Add to Next Installment(s)**, the underpayment amount is added to the next installment. Using the previous example where Javier pays only \$50 for the February installment, his March payment is increased to \$150.

To add underpayment amounts to the next installment:

1. In the Pledge Installment Recalculation Details page, select Add to next installment(s).

Default underpayment behavior
© Evenly Reallocate
Evenly distribute the new, larger balance across all remaining installments.
Add to next installment(s)
Add an additional installment on the same date as the underpaid installment to the pledge for the remaining balance to the end of the pledge.
C Add remaining balance to new subsequent payment
Add the underpayment amount to a new subsequent installment. The new installment will be for the remaining balance and have the same close date as the updated installment.
O Add installment to end of schedule
Add an additional installment to the end of the pledge for the underpayment amount, extending the final pledge fulfillment date. The additional installment will inherit the schedule of the original pledge.
© Disabled
No default underpayment recalculation behavior.

The underpayment is added to the next installment resulting in a March payment of \$150.

🕑 Ja	nations avier Bates \$1200.00 Pledge Javier Bates \$1200.00 Pledge			Printable View Help for this Page
Action	Donation Name	Account Name	Stage	Amount Close Date 🔹
Edit Del	Javier Bates \$1200.00 Pledge Installment 1 of 12	Javier Bates Household	Received	\$100.00 171/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 2 of 12	Javier Bates Household	Received	\$50.00 2/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 3 of 12	Javier Bates Household	Pending Installment	\$150.00 3/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 4 of 12	Javier Bates Household	Pending Installment	\$100.00 4/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 5 of 12	Javier Bates Household	Pending Installment	\$100.00 5/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 6 of 12	Javier Bates Household	Pending Installment	\$100.00 6/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 7 of 12	Javier Bates Household	Pending Installment	\$100.00 7/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 8 of 12	Javier Bates Household	Pending Installment	\$100.00 8/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 9 of 12	Javier Bates Household	Pending Installment	\$100.00 9/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 10 of 12	Javier Bates Household	Pending Installment	\$100.00 10/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 11 of 12	Javier Bates Household	Pending Installment	\$100.00 11/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 12 of 12	Javier Bates Household	Pending Installment	\$100.00 12/1/2012
		Show me fewer 🔺 records per list page		

Add Remaining Balance to New Subsequent Payment

If you have selected **Add Remaining Balance to New Subsequent Payment**, the underpayment amount is added to the last installment in the payment schedule. Using the previous example where Javier pays only \$50 for the February installment, and new February installment is created for \$50 for the outstanding balance.

To add underpayment amounts to a new, subsequent payment:

1. In the Pledge Installment Recalculation Details page, select Add Remaining Balance to New Subsequent Payment.

Default underpayment behavior
C Evenly Reallocate
Evenly distribute the new, larger balance across all remaining installments.
○ Add to next installment(s)
Add an additional installment on the same date as the underpaid installment to the pledge for the remaining balance to the end of the pledge.
Add remaining balance to new subsequent payment
Add the underpayment amount to a new subsequent installment. The new installment will be for the remaining balance and have the same close date as the updated installment.
C Add installment to end of schedule
Add an additional installment to the end of the pledge for the underpayment amount, extending the final pledge fulfillment date. The additional installment will inherit the schedule of the original pledge.
© Disabled
No default underpayment recalculation behavior.

A new payment is created for the remaining balance of \$50. There are now 13 installments instead of 12.

🕑 Já	nations avier Bates \$1200.00 Pledge Javier Bates \$1200.00 Pledge		Printable	e View Helj	p for this Page 😢
Action	Donation Name	Account Name	Stage	Amount	Close Date 🔹
Edit Del	Javier Bates \$1200.00 Pledge Installment 1 of 12	Javier Bates Household	Received	\$100.00	1/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 2 of 12	Javier Bates Household	Received	\$50.00	2/1/2012
Edit+Del	Javier Bates \$1200.00 Pledge Installment 3 of 13	Javier Bates Household	Pending Installment	\$50.00	2/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 3 of 13	Javier Bates Household	Pending Installment	\$100.00	3/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 4 of 13	Javier Bates Household	Pending Installment	\$100.00	4/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 5 of 13	Javier Bates Household	Pending Installment	\$100.00	5/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 6 of 13	Javier Bates Household	Pending Installment	\$100.00	6/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 7 of 13	Javier Bates Household	Pending Installment	\$100.00	7/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 8 of 13	Javier Bates Household	Pending Installment	\$100.00	8/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 9 of 13	Javier Bates Household	Pending Installment	\$100.00	9/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 10 of 13	Javier Bates Household	Pending Installment	\$100.00	10/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 11 of 13	Javier Bates Household	Pending Installment	\$100.00	11/1/2012
Edit Del	Javier Bates \$1200.00 Pledge Installment 12 of 13	Javier Bates Household	Pending Installment	\$100.00	12/1/2012

Add Installment to the End of Schedule

If you have selected **Add Installment to End of Schedule**, a new installment is added to the end of the payment schedule for the underpayment amount. In Javier's case, when he underpays by \$50.00, a new installment payment for \$50.00 is created and scheduled for January 2013.

To add underpayment amounts to the last installment:

1. In the Pledge Installment Recalculation Details page, select Add Installment to the End of Schedule.



A new installment is added to the payment schedule for the remaining balance of \$50 that is due in January 2013.

Donations Javier Bates \$1200.00 Pledge Pledge: Javier Bates \$1200.00 Pledge									
Action	Donation Name	Account Name	Stage	Amount	Close Date	۰.			
Edit Del	Javier Bates \$1200.00 Pledge Installment 1 of 12	Javier Bates Household	Received	\$100.00	1/1/2012				
Equt Del	Javier Bates \$1200.00 Pledge Installment 2 of 12	Javier Bates Household	Received	\$50.00	2/1/2012				
Edit Del	Javier Bates \$1200.00 Pledge Installment 3 of 13	Javier Bates Household	Pending Installment	\$100.00	3/1/2012				
Edit Del	Javier Bates \$1200.00 Pledge Installment 4 of 13	Javier Bates Household	Pending Installment	\$100.00	4/1/2012				
Edit Del	Javier Bates \$1200.00 Pledge Installment 5 of 13	Javier Bates Household	Pending Installment	\$100.00	5/1/2012				
Edit Del	Javier Bates \$1200.00 Pledge Installment 6 of 13	Javier Bates Household	Pending Installment	\$100.00	6/1/2012				
Edit Del	Javier Bates \$1200.00 Pledge Installment 7 of 13	Javier Bates Household	Pending Installment	\$100.00	7/1/2012				
Edit Del	Javier Bates \$1200.00 Pledge Installment 8 of 13	Javier Bates Household	Pending Installment	\$100.00	8/1/2012				
Edit Del	Javier Bates \$1200.00 Pledge Installment 9 of 13	Javier Bates Household	Pending Installment	\$100.00	9/1/2012				
Edit Del	Javier Bates \$1200.00 Pledge Installment 10 of 13	Javier Bates Household	Pending Installment	\$100.00	10/1/2012				
Edit Del	Javier Bates \$1200.00 Pledge Installment 11 of 13	Javier Bates Household	Pending Installment	\$100.00	11/1/2012				
Edit Del	Javier Bates \$1200.00 Pledge Installment 12 of 13	Javier Bates Household	Pending Installment	\$100.00	12/1/2012				
Edit Del	Javier Bates \$1200.00 Pledge Installment 13 of 13	Javier Bates Household	Pending Installment	\$50.00	1/1/2013	>			

GETTING STARTED

This section contains the following topics:

- Configuring the Pledge Installment Recalculation Method
- Manually Recalculating Pledge Installments

Configuring the Pledge Installment Recalculation Method

Pledge recalculation is done automatically when a gift is entered. Pledges are recalculated based on how you have configured the application.

To configure pledge recalculation behavior:

- 1. Click the **Configuration** tab. The **Home** page displays.
- 2. Click the **Installment Recalculation Defaults** link. The **Pledge Installment Recalculation Defaults** window displays.

Contacts	Donations	Pledges	Recurring Gifts	Tributes	Events	Volunteer Jobs	Campaigns	Batches	Utilities	Configuration
	Luminate CRM / Home	Administratio	n							
Donatio	on Lookup Val	ues								
	De	signation Ch	oices Configure th	e options for	recording d	onor instructions for I	how gifts are use	d by your org	anization.	
	Do	onation Docum	nents Configure do	ocuments to b	e used with	Donation Receipting	and Acknowledg	ment mail mer	ge.	
Contac	t Lookup Valu	es								
	<u>c</u>	lassification	Types Configure ho	w contacts a	are classifie	d.				
	!	Relationship	Types Configure th	e types of rel	ationships t	o track.				
Other										
	Volunteer	Qualification	types Configure th	e different qu	alifications	associated with volur	iteer jobs and oo	atacts		
	Installment Rec	alculation De	faults Configure th	e default reca	alculation be	havior when installm	ents are overpaid	or underpaid	>	

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3. Select the options appropriate for your organization and click **Save**.

Contacts	Donations	Pledges	Recurring Gifts	Tributes	Events	Volunteer Jobs	Campaigns	Batches	Utilities	Configuration	Resource Center	Duplic
Pledo	ie Instal	Iment	Recalculat	ion De	faults							
-			s are recalculated v									
Default ov	erpayment be	ehavior										
	y Reallocate											
Evenly	distribute the ne	ew, smaller ba	alance across all rema	aining installm	ents.							
O Dedu	ct from next in	nstallment(s	s)									
Fully de	educt the overp	ayment amou	nt from the next and e	ach subsequ	ent installm	ent until fully applied, f	then resume the o	original sched	ule for all rei	maining installments		
Oedu	ct from Final I	nstallment(s	s)									
Fully de	educt the overp	ayment amou	nt from the final and e	ach prior inst	allment until	fully applied. This may	y allow the pledg	e to be fulfille	d earlier thar	n originally planned.		
O Disab	led											
No defa	ault overpaymer	nt recalculatio	on behavior.									
Default un	iderpayment l	behavior										
Event	y Reallocate											
Evenly	distribute the ne	ew, larger bal	lance across all remai	ning installme	nts.							
O Add t	o next installn	nent(s)										
Add an	additional insta	llment on the	same date as the und	erpaid installn	nent to the p	bledge for the remaini	ng balance to the	end of the ple	edge.			
Add r	emaining bala	ince to new	subsequent payme	ent								
			new subsequent insta		ew installm	ent will be for the rem	naining balance a	nd have the s	ame close da	ate as the updated i	installment.	
C Add ii	nstallment to	and of ashe	dula									
				he underpayr	nent amoun	t, extending the final p	pledge fulfillment	date. The add	itional installi	ment will inherit the	schedule of the original	pledge.
O Disab		ant received	ion behavior									
No della	ault underpaym	sint recalculat										
Save												

Manually Recalculating Pledge Installments

If you need to customize and adjust the installment payments in a way that is not covered by the pledge recalculation settings, you can manually set the amount of all the payments. For example, Jolie Pitt has pledged \$1000 over 5 payments, but, for financial reasons, must pay in different amounts every month. In such a case you will have to manually set the payment amounts.

To manually change the installment amounts:

- 1. Open the Pledge Details window.
- 2. Scroll down to the Installments section.

3. Click Edit Multiple Installments.

🥑 Insta	Installments									
Action	Donation Name	Account Name	Stage	Amount	Close Date					
Edit Del	Jolie Pitt \$5000.00 Pledge Installment 1 of 5	Brad Pitt	Pending Installment	\$1,000.00	6/22/2012					
Edit Del	Jolie Pitt \$5000.00 Pledge Installment 2 of 5	Brad Pitt	Pending Installment	\$1,000.00	7/1/2012					
Edit Del	Jolie Pitt \$5000.00 Pledge Installment 3 of 5	Brad Pitt	Pending Installment	\$1,000.00	8/1/2012					
Edit Del	Jolie Pitt \$5000.00 Pledge Installment 4 of 5	Brad Pitt	Pending Installment	\$1,000.00	9/1/2012					
Edit Del	Jolie Pitt \$5000.00 Pledge Installment 5 of 5	Brad Pitt	Pending Installment	\$1,000.00	10/1/2012					

The Edit Pending Installments page displays.

4. Click inside a field in the **Amount** column to change the amounts and click **Save**.

Note: If the amounts you enter do not equal the total pledge amount, you won't be able to save the page and you will receive an error message.

Jol	Jolie Pitt \$5000.00 Pledge									
Edit P	Edit Pending Installments.									
Rea	calculate or click in a row to edit individually.	Pledge Balance:	\$5000.00							
	Installment	Close Date	Amount							
•	Jolie Pitt \$5000.00 Pledge Installment 1 of 5	6/22/2012	\$600.00							
•	Jolie Pitt \$5000.00 Pledge Installment 2 of 5	7/1/2012	\$1400.00							
•	Jolie Pitt \$5000.00 Pledge Installment 3 of 5	8/1/2012	\$230.00							
•	Jolie Pitt \$5000.00 Pledge Installment 4 of 5	9/1/2012	\$1770.00							
•	Jolie Pitt \$5000.00 Pledge Installment 5 of 5	10/1/2012	\$1000.00							
¢	Add Installment									
		Total Allocated	\$5000.00							
		Unallocated	\$0.00							
		Cancel	Save							

The **Pledge Details** page displays.

5. Scroll down to the Installments section to verify that the changes were made to the payment schedule. You have successfully changed the payment amounts.

🥑 Insta	allments	Edit Multiple Installments			\frown	Installments Help 🧃
Action	Donation Name		Account Name	Stage	Amount	Close Date
Edit Del	Jolie Pitt \$5000.00 Pledge Installment 1 of 5		Brad Pitt	Pending Installment	\$600.00	6/22/2012
Edit Del	Jolie Pitt \$5000.00 Pledge Installment 2 of 5		Brad Pitt	Pending Installment	\$1,400.00	7/1/2012
Edit Del	Jolie Pitt \$5000.00 Pledge Installment 3 of 5		Brad Pitt	Pending Installment	\$230.00	8/1/2012
Edit Del	Jolie Pitt \$5000.00 Pledge Installment 4 of 5		Brad Pitt	Pending Installment	\$1,770.00	9/1/2012
Edit Del	Jolie Pitt \$5000.00 Pledge Installment 5 of 5		Brad Pitt	Pending Installment	\$1,000.00	10/1/2012

ADDITIONAL RESOURCES

We understand that our solutions are an integral part of your organization's success, and so we offers several ways for you to get the help and information you need:

Learn More »

<u>Summer 2012 Release</u> – The community is a one-stop-shop containing everything you need to know about the release, including an overview of all the new functionality, summaries of other features, and links to release-specific training and help resources.

Get Support »

<u>Support</u> – Our Client Care team strives to provide you with the best possible support experience by promptly responding to questions and resolving issues submitted via the method that's most convenient for you. In addition to contacting us via a case or phone, you also have the option to chat with us live to get a quick answer for your quick questions.

<u>Training</u> – We offer a diverse set of training options to meet a variety of roles, learning styles, and situations. Track your learning path and history, view upcoming classes, download documentation and best practices, and browse other resources – via a web browser, at no extra charge, no matter where you are.

Get Started »

<u>Release Calendar</u> – For Luminate Online products, review our Release Planning Calendar to determine when this update will be available to you. For Luminate CRM, please contact your Account Representative.

GIVE US YOUR FEEDBACK

Have a suggestion for a future release? "Ideas" is a tool used by our Product Management team to determine which enhancements are most popular among our clients. You can help shape the future of our roadmap by entering a nominee and voting for ideas submitted by other clients. To participate, visit the <u>Customer Center</u> and click "Support". Once you are in the Support portal, click the "Ideas" tab to begin using the feedback tool.