Reunion Giving Pledge Form

The Reunion Giving Pledge form is available on the SOM Website, and is intended for alumni to declare multi-year pledges, in which the development team will follow up and ensure the gift is processed appropriately.

Information

The reunion pledge form is available at:

And allows an alumni to pledge a specific amount over an installment period of year. The form is a simple Salesforce form, when the alumni enters the required data and clicks SUBMIT, the form will complete the following actions:

1. A confirmation eMail is sent to the alumni
2. The information is stored in Salesforce as a pledge object

The Reunion development team processes the pledges by signing into Salesforce to review the pledge objects.

Steps to Process the Pledge

In order to review and process the pledges, the steps are as follows:

1. Sign into Salesforce with your eMail address and assigned password at https://yale-som.lightning.force.com/lightning/page/home
2. Upon signing into Salesforce - select Pledges from the menu bar
   <insert picture here>
   The pledges are sorted in date received order, so you should see the oldest one first on the list. All incoming pledges have a default status of NEW.
   Status is defined as follows:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>The pledge is new and has not been assigned or processed by a staff member</td>
<td>When a pledge comes in, this is its’ initial default value</td>
</tr>
<tr>
<td>Assigned</td>
<td>The pledge has been assigned to a staff member, and they are the point person</td>
<td>Automatically set when Internal Contact field has been updated</td>
</tr>
<tr>
<td>In Progress</td>
<td>Communication to the alumni has begun and the information is being gathered to process the pledge</td>
<td>Must be set manually</td>
</tr>
<tr>
<td>Complete</td>
<td>The pledge has been processed and there is no further need to review the record</td>
<td>Must be set manuallyWhen a pledge record is set as complete, it no longer shows up in the list of pledges to process A report can be generated on completed pledges</td>
</tr>
</tbody>
</table>

3. The pledges should be processed in the order they were received. Their status is set to NEW automatically.
4. Select and open the first pledge in the list by clicking on the <pledge object number?>
5. Assign the record to yourself by using the dropdown list in the Internal Contact field. This will change the status of the record to ASSIGNED
6. Staff communicating with the alumni can put notes into the Internal Notes field. It is a best practice to set the record to In Progress once you have initiated contact with the alumni who has pledged
7. When the pledge is processed by the staff member, and the team is done with the record, set the record to COMPLETE. This indicates no further action is needed.
Team Calendars

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