

Pledge Forecasting Report by Designation

Development

Author Kimberly Albrecht
 Ext. 2197

Description

This report calculates the projected amount to be received from pledges by designation.

Parameters

<i>Snapshot</i>	Date of the snapshot you wish to view. Read more about snapshots in the Additional Notes section.
-----------------	---

Columns

<i>Desig</i>	CONDES.DESIGNATION that the future payments are expected to be applied to.
<i>Pledge Type</i>	Major or Minor pledge. A Major pledge has an original pledge amount greater than \$20,000. The rest are considered Minor.
<i>ID</i>	PERSON.ID of the donor.
<i>Name</i>	Full name of the pledge's donors.
<i>Pledge #</i>	PLEDGE.ID
<i>Past Due</i>	Total amount that is considered past due. Calculated by totaling the pledge payments made and subtracting that amount from the expected payments. Expected payments are calculated by totaling the PLSCHED.AMT with a PLSCHED.DUE.DATE less than or equal to the Past Due Date.
<i>[Current Dates]</i>	Future pledge payments expected from the Past Due Date + 1 day until the end of that quarter. Not displayed if running the report at the end of a quarter.
<i>[Quarters]</i>	Future pledge payments expected for each of the quarters remaining in the current fiscal year.
<i>[Years]</i>	Future pledge payments expected for the next 3 years after the current fiscal year.
<i>Future</i>	All future pledge payments not currently accounted for in the report.

Row Groups

<i>Designation</i>	CONDES.DESIGNATION of the pledges
<i>Pledge Type</i>	Major or Minor pledge. Major is a pledge amount greater than or equal to \$20,000.

Additional Notes

The amounts are subtotaled by CONDES.DESIGNATION and PLEGE TYPE. There is also a grand total reported.

This report is a snapshot. This means the data was saved explicitly by another process. In this particular report the snapshot date is the Past Due Date that was used when the report was ran. The original parameters used on the report are displayed. They are the Past Due Date used to calculate the Past Due information, the Fiscal Year Start used to calculate the quarters and future fiscal years, and the Snapshot Created date which shows when the data was captured from the live database.

This snapshot is created by the Pledge Forecasting process in the Development Menu of the Monmouth College Datatel Programs executable. It must be explicitly created; it is not generated automatically.