

How do I link a pledge to an installment paid by a third-party?

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As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. Q&A articles are only visible to authenticated users in the Veracross Community; please speak with your implementation or account manager for additional information.

When entering a donation, the system only searches for open pledges made in the name of the donor or donor organization. Follow the steps below to link a donation made in the name of a third party:

Donor Pledge

1. Populate the Donor field with the name of the individual who made the pledge
2. Link the pledge to the donation and update to save changes
3. Clear the field type (Donor or Donor Organization) with the name of the third-party making the payment
4. Enter the remaining donation information as normal

Donor Organization Pledge

1. Populate the Donor Organization field with the name of the organization who made the pledge
2. Link the pledge to the donation and update to save changes
3. Clear the field type (Donor or Donor Organization) with the name of the third-party making the payment
4. Enter the remaining donation information as normal

Note: if the donation has already been posted, engineering will need to un-post the donation before the updates can be made. If the donation was already entered and posted in the name of the third party donor. If the donation is not posted, the updates can be made as listed above.
