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Creating and Using Custom Fields

If you can't find what you need, you can always add custom fields to the program, for mail merge and reports. To do this, follow the steps below:

1. From the main menu, click on Organization Information.
2. Click on the Customizable Fields tab at the top of the screen.
3. In the Field Name column, add a Custom Field Name (this cannot contain spaces).
4. In the Form Caption column – the same as the Field Name. This is the caption/column name that appears in the Supporters screen, Custom Fields tab.
5. In the Report Caption column – the same as the Field Name. This is the caption/column name that appears at the top of your report column.
6. In the Data Type column – choose between text, currency, decimal points, etc. These options are available through a pull-down menu, once you click inside the column.
7. In the Width column, make this wide enough to handle any data and/or the Report Caption.
8. In the Label Justification column, choose normal, left, right or center. This will determine how your answers are displayed in the column. These options are available through a pull-down menu, once you click inside the column.
9. Follow steps 3 through 8 for any other custom fields that are needed.
10. When you close out of Organization Information, the system will verify those new fields for each supporter. This may take a minute or two to complete, depending on file size.
11. Fill in the answers
From the Main Menu, click on Supporters. Search for each supporter, click on the Custom Fields tab and fill in the data in the “Answer” column.
12. Once your data has been entered for each supporter, you can:
 - a. Use the field in Mail Merge – the filed name will be [FieldName] based on exactly you named the field in step #3 above
 - b. Report on the field with the Custom Field Value Count Report
 - c. Filter by the field on the Supporter Selection Engine