



**Vision Computer Programming Services, Inc.**  
801 2<sup>nd</sup> Street North, Suite A Safety Harbor, FL 34695  
888-425-6964 [email@visioncps.com](mailto:email@visioncps.com) [www.visioncps.com](http://www.visioncps.com)

## Supporter Donation System Quick Tips Meetings

Meetings can be created for Board or Staff Meetings or any meetings having to do with your Campaigns, Appeals or Sub-Appeals

The screenshot shows the 'Meetings' application window. At the top, there are search fields for 'Find Meeting by Name' (set to 'Board Meeting Third Quarter 2018') and 'Find Meeting by Date'. Below these are fields for 'Meeting Name' (same as search), 'Abbreviation' ('Bd Q3 2018'), 'Meeting Date' ('09/15/18'), 'Meeting Time', and '# Other Attendees'. A tabbed interface is visible with 'Invitees' selected. The main area contains a table with columns for 'Supporter/Role', 'Will Attend', and 'Attended'. The table lists 16 invitees, all with 'Direct Supporter' roles. The 'Will Attend' column has radio buttons for 'Yes', 'Unknown', or 'No'. The 'Attended' column has checkboxes. At the bottom, there are buttons for 'Add Meeting', 'Delete Meeting', 'Add Invitees by Classification', 'Attendance List', 'Meeting Report', a help icon (?), and 'Close'.

Supporter/Role	Will Attend	Attended
Bartles, Larry as Direct Supporter	Yes	<input type="checkbox"/>
Bergon, Scott as Direct Supporter	Unknown	<input type="checkbox"/>
Camden, Brianna as Direct Supporter	Unknown	<input type="checkbox"/>
Charleston, Pat as Direct Supporter	Unknown	<input type="checkbox"/>
Colby, Brian as Direct Supporter	Unknown	<input type="checkbox"/>
Dillinger, Mike as Direct Supporter	Unknown	<input type="checkbox"/>
Durkin, Joseph as Direct Supporter	Unknown	<input type="checkbox"/>
Ferguson, Randy as Direct Supporter	Unknown	<input type="checkbox"/>
Fisher, Marybeth as Direct Supporter	Unknown	<input type="checkbox"/>
Foxtan, Laura as Direct Supporter	Unknown	<input type="checkbox"/>
Gottlieb, Jeremy as Direct Supporter	Unknown	<input type="checkbox"/>
Grabling, Scott as Direct Supporter	Unknown	<input type="checkbox"/>
Grims, Dereck as Direct Supporter	Unknown	<input type="checkbox"/>
Harding, John as Direct Supporter	Unknown	<input type="checkbox"/>
Johns, Mike as Direct Supporter	No	<input type="checkbox"/>
Johnson, Jamie as Direct Supporter	Unknown	<input type="checkbox"/>
Kelson, Keith as Direct Supporter	Unknown	<input type="checkbox"/>

1. From the Main Menu, click on Meetings
2. Click on the Find Meeting by Name or Date dropdown to see what meetings you have available
3. If the Meeting you need is not available then
4. Click on the Add Meeting button in the bottom left
5. Fill in the Meeting name, date and time
6. Choose the Invitees by clicking on the white Supporter/Role field
7. Click on the dropdown and choose a supporter from the list OR;
8. Click on the Add Invitees by Classification button on the bottom
9. Choose a classification from the dropdown
10. Click on the Add Supporters to Meeting button
11. For each supporter choose Unknown, Yes or No for the Will Attend option
12. Click on the Topic & Location tab and fill in any information here as needed
13. Click on the Agenda tab and type in your meeting agenda here
14. Click on the Expenses tab and fill in any expenses related to this meeting
15. Click on the Minutes tab and type in your meeting minutes here
16. Click the Misc. tab to attach files/documents such as copied of the Agenda or Minutes to the meeting

Use the Attendance List button on the bottom to preview or print a list of meeting attendees  
Click on the Meeting Report button to print all or part of the information regarding a specific meeting