



Vision Computer Programming Services, Inc.
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Supporter Donation System Quick Tips Organization Information

The Organization Information is basic information about your organization that needs to be setup prior to getting started with data entry in order to have correct information in your dropdowns to fill in for your supporters. Vision has provided some of the basics for you to get started.

Organization Information

Expense Types Comment Types Task (Solicitation) Types Misc. 1 Misc. 2 Misc. 3 Letters Legal Notices
General Address Types & Validation Customizable Fields Name Types Phone/Email Types Role Types Supporter Status

Vision's Organization

Organization Name: Vision's Organization [Customize Data Entry Forms](#)

Director: Michael Dommer
Director's Title: President / CEO

Annual Goal: \$500,000.00
Fiscal Year Start: 01/01/2018 End: 12/31/2018
Solicitation Number:
EIN:
State Tax ID:
Payment Note:
Default Area Code: 727
Attempts to Login: 5 Site Code: 3189

Automatically check the internet for upgrades
 Use Supporter's Primary Solicitor for new Pledges

Sending Email via SMTP
Server:
User:
Password:
Use SSL: No Authenticate: Yes Port#:
[Send Test Email](#)

Record: 1 of 1

Phone #	EXT	Type	Primary
888-425-6964		Business	<input checked="" type="checkbox"/>
*			<input type="checkbox"/>

Record: 2 of 2

[?](#) [Close](#)

1. From the Main Menu, click on Organization Information
2. Fill in your Organization Name, Director, Title
3. Click on the Add New Address button and fill in your street address
4. Click on the Add New Address button and fill in your mailing address if it is different
5. Fill in the Address Type and choose one of the addresses as the Primary Address
6. Country is OPTIONAL
7. Fill in all of your organization phone numbers, fax, email and web site in the Phone section
8. Fill in your Annual Goal and Fiscal Year
 - a. **NOTE:** this will need to be changed ANNUALLY
9. Fill in your Solicitation Number, EIN, State Tax ID and Payment Note (if applicable)
10. Fill in your Default Area Code **NOTE:** this allows you to type your 7 digit phone and the area code will automatically fill in
11. Fill in Attempts to Login **NOTE:** this is the number of times someone can try a password without it being disabled which then requires a call to Vision to reset the password
12. Choose whether or not you want to automatically check the internet for software upgrades – this feature will notify you when there is a new upgrade available on the Vision web site www.visioncps.com
13. Choose whether or not to Use the Supporter's Primary Solicitor for new Pledges.
14. Setup emails to be sent via SMTP if needed

Organization Information							
Expense Types	Comment Types	Task (Solicitation) Types	Misc. 1	Misc. 2	Misc. 3	Letters	Legal Notices
General	Address Types & Validation	Customizable Fields	Name Types	Phone/Email Types	Role Types	Supporter Status	

The information in these screens are used in specific areas of the program. Fill in as much information here as you can. If you need additional items in your dropdowns you can come back to add more later.

1. Address Types & Validation

- a. Fill in any additional address types you may need EXAMPLES: home, business
- b. Address Validation allows you to validate supporters addresses from the Supporters screen

2. Customizable Fields

Create any Custom Fields you may need NOTE: this probably will come later after you have familiarized yourself with the program. It is used to create a new field if there is not a field available for something you need to report on a supporter. We recommend you call Vision to discuss this feature.

3. Name Types

Fill in any additional name types you may need NOTE: these are used for envelopes, letters, how a name is displayed on a report, etc

4. Phone/Email Types

Fill in any additional phone and email types you may need EXAMPLES: home, cell, fax

5. Role Types

Fill in any additional roles you may need NOTE: this is the method the Supporter Donation System uses to describe a persons relationship with your organization EXAMPLES:

- a. Nicole Dommer is a 'Direct Supporter' if she writes you a personal check
- b. Nicole Dommer is an 'Employee of' Vision Computer Programming Services if Vision writes you a check
- c. Nicole Dommer is a 'Spouse of' Michael Dommer if Michael writes you a check
- d. NOTE: Nicole can be all three roles in the system

6. Supporter Status

Fill in any additional status names you may need EXAMPLES: active, inactive, lead

7. Expense Types

Fill in any additional expense types you may need EXAMPLES: advertising, catering, meals

8. Comment Types

Fill in any additional comment types needed EXAMPLES: news article, preferences, hobbies

9. Task (Solicitation) Types

Fill in any additional solicitation types needed EXAMPLES: mail, phone, email

10. Misc. 1

Fill in any additional default Titles, Suffixes, Methods of Payment and Partner Relationships you would like to have available

11. Misc. 2

- a. Fill in any Storage Locations you might need for auction items
- b. Add Marital Statuses if needed
- c. Choose your Calendar Time Format that will show on all screens
- d. Optionally work with Vision to integrate the SDS with QuickBooks

12. Misc. 3

Credit Card Processing – click the link on the screen or contact Vision for more information

13. Letters

Fill in the default locations for your quick letters, default date format and name type for pledge solicitor

14. Legal Notices

Fill in the legal paragraph that will show on all Auction Receipts