

## Vision Computer Programming Services, Inc.

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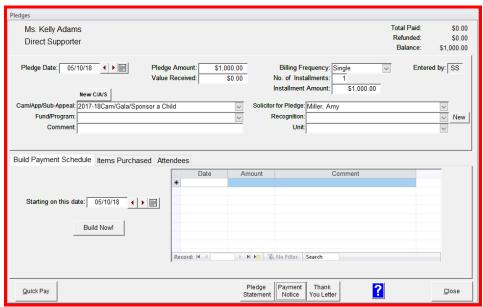
## **Supporter Donation System Quick Tips Pledges**

Pledges come in all sizes and types, big and small, single or multiple installments, for specific programs, by specific solicitors and more.

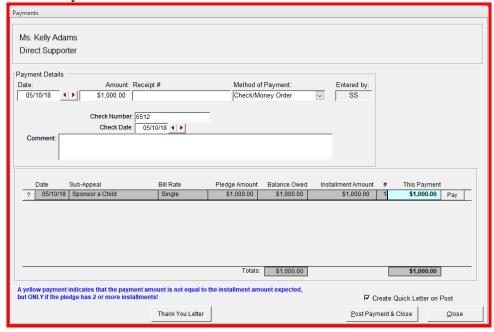
## **Simple Pledge**

This is a pledge that is given and paid right away.

- 1. From the Supporters screen click on the Add Pledge button on the bottom
- 2. Fill in the Pledge Date. NOTE: today's date automatically fills in use the arrows or calendar to change the date if needed.
- 3. Fill in the Pledge Amount.
- 4. Fill in the Value Received. NOTE: this is the value of the item received for the donation.
- 5. The Billing Frequency for a Simple Pledge will be Single.
- 6. The No. of Installments for a Simple Pledge will be 1.
- 7. The Installment Amount for a Simple Pledge will match the Pledge Amount for a Simple Pledge.
- 8. Choose the Appeal/Sub-Appeal from the dropdown list. NOTE: If you do not find the Appeal/Sub-Appeal that you need then Cancel Pledge and Close out of this screen to the Main Menu and open Campaigns/Appeals/Sub-Appeals and add a new Appeal and Sub-Appeal that meets your needs.
- 9. Choose a Fund/Program from the dropdown list. NOTE: sometimes after choosing the Appeal/Sub-Appeal you will see the Program but it will be grayed out, this means that the Appeal/Sub-Appeals has the default Program already chosen and you will not need to choose a program.
- 10. Fill in a Comment if needed. (Optional)
- 11. Choose a Solicitor for Pledge if a specific person solicited this Pledge. (Optional)
- 12. Fill in Recognition information if this pledge is in recognition of someone. (Optional)
- 13. Choose a Unit from the dropdown that this pledge should be associated with. (Optional)
- 14. Click on Save Pledge.
- 15. With a Simple Pledge you would then click on Quick Pay at the bottom of the screen and the date and dollar amount will already be filled in.



- 16. Choose the Method of Payment from the dropdown and fill in any subsequent information for that method of payment such as check number for check or card type, name, number and expiration date for a credit card.
- 17. Fill in a Comment if needed.
- 18. Turn on and leave on the Create Quick Letter on Post checkbox on the lower right of the screen
- 19. Click the Post Payment and Close.

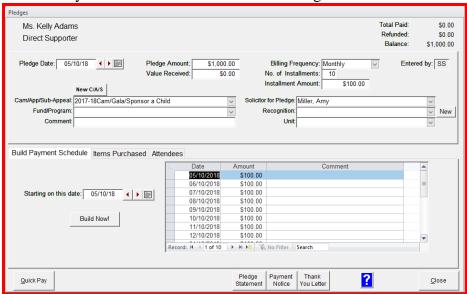


20. You can then print a Thank You letter or Close

## **Installment Pledge**

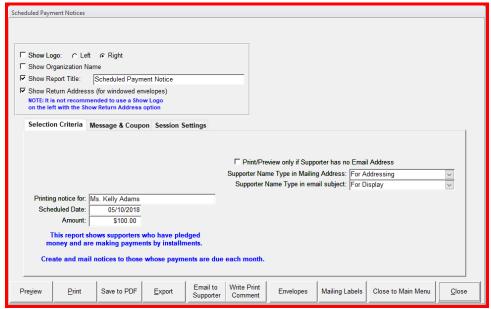
This is a pledge that is paid over time.

- 1. From the Supporters screen click on the Add Pledge button on the bottom
- 2. Fill in the Pledge Date. NOTE: today's date automatically fills in use the arrows or calendar to change the date if needed.
- 3. Fill in the Pledge Amount.
- 4. Fill in the Value Received. NOTE: this is the value of the item received for the donation.
- 5. The Billing Frequency for an Installment Pledge will be chosen from the dropdown.
- 6. The No. of Installments for an Installment Pledge can be any number.
- 7. The Installment Amount for an Installment Pledge will be automatically calculated based on the Pledge Amount and Billing Frequency and No. of Installments.
- 8. Choose the Appeal/Sub-Appeal from the dropdown list. NOTE: If you do not find the Appeal/Sub-Appeal that you need then Cancel Pledge and Close out of this screen to the Main Menu and open Campaigns/Appeals/Sub-Appeals and add a new Appeal and Sub-Appeal that meets your needs.
- 9. Choose a Fund/Program from the dropdown list. NOTE: sometimes after choosing the Appeal/Sub-Appeal you will see the Program but it will be grayed out, this means that the Appeal/Sub-Appeals has the default Program already chosen and you will not need to choose a program.
- 10. Fill in a Comment if needed. (Optional)
- 11. Choose a Solicitor for Pledge if a specific person solicited this Pledge. (Optional)
- 12. Fill in Recognition information if this pledge is in recognition of someone. (Optional)
- 13. Choose a Unit from the dropdown that this pledge should be associated with. (Optional)
- 14. Click on Save Pledge.
- 15. In the Build Payment Schedule section on the left choose the starting on date for the payment schedule and click on the Build Now button.
- 16. Click OK for the Payment Schedule has been built message.

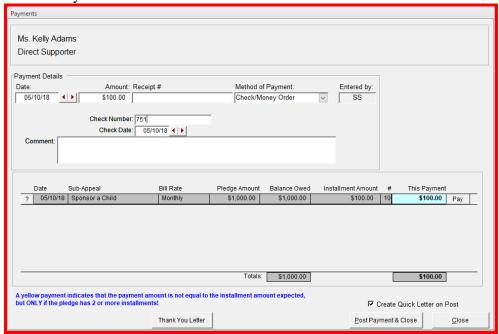


17. Click on the Payment Notice button to Preview and Print a Scheduled Payment Notice for your supporter

18. You can Email the Payment Notice or print the Payment Notice with an Envelope or Mailing Label from this screen



- 19. Close this screen.
- 20. If the Supporter is making their first payment then click on the Quick Pay button on the bottom of the screen, the date and dollar amount will already be filled in.
- 21. Choose the Method of Payment from the dropdown and fill in any subsequent information that goes along with that method of payment such as check number for check or card type, name, number and expiration date for a credit card.
- 22. Fill in a Comment if needed.
- 23. Click the Post Payment and Close.



24. You can then print a Thank You letter or Close