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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.

Pledges

Ms. Kelly Adams  
Direct Supporter

Total Paid: \$0.00  
Refunded: \$0.00  
Balance: \$1,000.00

Pledge Date: 05/10/18 Pledge Amount: \$1,000.00 Billing Frequency: Single Entered by: SS  
Value Received: \$0.00 No. of Installments: 1  
Installment Amount: \$1,000.00

New C/A/S

Cam/App/Sub-Appeal: 2017-18Cam/Gala/Sponsor a Child Solicitor for Pledge: Miller, Amy  
Fund/Program: Recognition: Unit: New

Comment:

Build Payment Schedule Items Purchased Attendees

Starting on this date: 05/10/18

Build Now!

Date	Amount	Comment
*		

Record: No Filter Search

Quick Pay Pledge Statement Payment Notice Thank You Letter ? Close

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.

Payments

Ms. Kelly Adams  
Direct Supporter

Payment Details

Date: 05/10/18 Amount: \$1,000.00 Receipt #: Method of Payment: Check/Money Order Entered by: SS

Check Number: 6512  
Check Date: 05/10/18

Comment:

Date	Sub-Appeal	Bill Rate	Pledge Amount	Balance Owed	Installment Amount	#	This Payment	
?	05/10/18	Sponsor a Child	Single	\$1,000.00	\$1,000.00	\$1,000.00	1	\$1,000.00 Pay

Totals: \$1,000.00 \$1,000.00

A yellow payment indicates that the payment amount is not equal to the installment amount expected, but ONLY if the pledge has 2 or more installments!

Create Quick Letter on Post

Thank You Letter Post Payment & Close 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.

Pledges

Ms. Kelly Adams  
Direct Supporter

Total Paid: \$0.00  
Refunded: \$0.00  
Balance: \$1,000.00

Pledge Date: 05/10/18 Pledge Amount: \$1,000.00 Billing Frequency: Monthly Entered by: SS  
Value Received: \$0.00 No. of Installments: 10  
Installment Amount: \$100.00

New CIA/S

Cam/App/Sub-Appeal: 2017-18Cam/Gala/Sponsor a Child Solicitor for Pledge: Miller, Amy  
Fund/Program: Recognition: New  
Comment: Unit:

Build Payment Schedule Items Purchased Attendees

Starting on this date: 05/10/18

Build Now!

Date	Amount	Comment
05/10/2018	\$100.00	
06/10/2018	\$100.00	
07/10/2018	\$100.00	
08/10/2018	\$100.00	
09/10/2018	\$100.00	
10/10/2018	\$100.00	
11/10/2018	\$100.00	
12/10/2018	\$100.00	

Record: 1 of 10 No Filter Search

Quick Pay Pledge Statement Payment Notice Thank You Letter ? Close

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

Scheduled Payment Notices

Show Logo:  Left  Right

Show Organization Name

Show Report Title:

Show Return Address (for windowed envelopes)

NOTE: It is not recommended to use a Show Logo on the left with the Show Return Address option

**Selection Criteria** **Message & Coupon** **Session Settings**

Print/Preview only if Supporter has no Email Address

Supporter Name Type in Mailing Address:

Supporter Name Type in email subject:

Printing notice for:

Scheduled Date:

Amount:

This report shows supporters who have pledged money and are making payments by installments.

Create and mail notices to those whose payments are due each month.

Preview Print Save to PDF Export Email to Supporter Write Print Comment Envelopes Mailing Labels Close to Main Menu Close

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.

Payments

Ms. Kelly Adams  
Direct Supporter

Payment Details

Date:  Amount:  Receipt #:  Method of Payment:  Entered by:

Check Number:

Check Date:

Comment:

Date	Sub-Appeal	Bill Rate	Pledge Amount	Balance Owed	Installment Amount	#	This Payment
? 05/10/18	Sponsor a Child	Monthly	\$1,000.00	\$1,000.00	\$100.00	10	\$100.00 Pay

Totals:

A yellow payment indicates that the payment amount is not equal to the installment amount expected, but ONLY if the pledge has 2 or more installments!

Create Quick Letter on Post

Thank You Letter Post Payment & Close Close

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