



Vision Computer Programming Services, Inc.

801 2nd Street North, Suite A Safety Harbor, FL 34695

888-425-6964

email@visioncps.com

www.visioncps.com

Supporter Donation System Quick Tips Funds / Programs

A Fund is the account that holds the money that is set aside for a specific purpose

A Program is a subset of a fund. Programs are created when money to be used for a particular purpose needs to be allocated.

FUNDS

1. From the Main Menu, click on Funds/Programs
2. Click on Fund dropdown at the top of the screen to see what funds are available
3. Click on Add Fund button on the bottom to add new funds
4. Fill in the Fund name and abbreviation (used on forms where space is limited)
5. Click on Add
6. The Program Summary tab will show a list of all programs for the chosen fund
7. Click on the Notes / Comments tab and fill in any additional information about this Fund that is needed

PROGRAMS

1. Click on the Program dropdown at the top of the screen to see what programs are available
2. Click on the Add Program button on the bottom to add new programs
3. Fill in the Program name, abbreviation (used on forms where space is limited), start date, end date, description and goal
4. Click on Add
5. The Pledges tab will show the pledges that have been applied to this program over time
6. The Payments tab will show the payments that have been applied to this program over time
7. The In-Kind tab will show the in-kind donations that have been applied to this program over time
8. Click on the Notes / Comments tab and fill in any additional information about this Program that is needed

Programs can be re-assigned to other funds if needed