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Supporter Donation System Quick Tips Pledge Pay Quick Letters

CREATE A LETTER:

Creating a Quick Letter is based on the Sample Quick Letter that is provided with your software

1. Click on Supporters from the Main Menu
2. Choose a Supporter and click on the Quick Letters button
3. Double click on the field in the Document column to choose a letter
4. Browse to C:\SDS\Quick Letters and choose the SampleQuickLetter.doc
5. Click on the Edit Letter Template button to open the Sample Quick Letter - the Sample Quick Letter is a sample of a letter
6. To create a new letter, click File on the Microsoft Word tool bar
7. Click on Save As
8. Go to C:\SDS\Quick Letters or to the Quick Letters folder on your server and name your new Quick Letter anything you want EX: *Thank You Annual Gala*
9. Setup your margins for your letterhead
10. Use the same fields that are on the existing sample letter for date and addressing and salutation
11. Type in the body of your letter and fill in the closing
12. Click on SAVE to save this new letter
13. NOTE: You do NOT have to create Quick Letters from within the Supporter Donation System. You can simply type letters in MS Word and save them in your Quick Letters folder or somewhere that all your users can access them from within the Supporter Donation System.

The fields that can be use are listed below and must be typed into the Quick Letter EXACTLY as you see them here. This list is also in the **HELP ?** section at the bottom of the Quick Letters screen.

Quick Letters Help

HELP ?

Definitions Fields Create a Letter Print a Letter

The fields listed below are available to be used in Quick Letters - not all fields will have data in all situations.
The fields must be typed into the Quick Letter EXACTLY as you see them here; that is, you must include the brackets!
You can copy a field to the clipboard by first highlighting it (including the brackets), then using CTL+C or right-click and "Copy".

[Title]	[SupporterStatus]	[PledgeAmount]	[FundName]	[PartnerFirstName]
[First]	[RoleStatus]	[ValueReceived]	[ProgramName]	[SupporterFullNameWithTitle]
[Middle]	[Occupation]	[PaymentDate]	[PledgeComment]	[SupporterFullName]
[Last]	[Industry]	[PaymentAmount]	[PledgeSolicitor]	[CasualAddressSingle]
[Suffix]	[JobTitle]	[MethodOfPayment]	[Recognition]	[CasualAddressCouple]
[Nickname]	[Source]	[CheckNo]	[RecognitionName]	[FormalAddressBothFirstNames]
[PartnerTitle]	[Birthdate]	[CheckDate]	[UnitName]	[FormalGreetingSingle2]
[PartnerFirst]	[BirthMonth/Day]	[PaymentComment]	[InKind]	[FormalGreetingSingle]
[PartnerMiddle]	[Gender]	[BillingFrequency]	[SeatAssignment]	[FormalGreetingCouple2]
[PartnerLast]	[LetterDate]	[NumberOfInstallments]	[Miscellaneous]	[FormalGreetingCouple]
[PartnerSuffix]	[FullAddress]	[InstallmentAmount]	[ReceiptNo]	[CasualGreetingSingle]
[BusinessName]	[PledgeDate]	[Balance]	[WriteoffAmount]	[CasualGreetingCouple]
	[NumberOfTickets]	[CampaignName]	[DeclaredValue]	[AddressName]
		[AppealName]		[DisplayName]
		[SubAppealName]		[PartnerFullName]

Print Field List Close

PLEDGE:

1. Go to Supporters on the Main Menu
2. Choose a Supporter and click on the Pledges tab
3. Click on Add Pledge button on the bottom of the screen
4. Fill in:
 - a. Pledge amount
 - b. Value Received
 - c. Choose a Billing Frequency, Installments and Installment Amount if this pledge will be paid over time
 - d. Cam/App/Sub-Appeal
 - e. Optionally fill in the Fund/Program, Comment, Solicitor for Pledge, Recognition and Unit
5. Click on Save Pledge button on the bottom of the screen

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:
Fund/Program: Recognition:
Comment: Unit:

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

6. Click the Build the Payment Schedule if the payment will be over time

PAYMENT:

1. Click on Quick Pay button on the bottom of the Pledges screen
2. Fill in Method of Payment and Comment if needed
3. Turn on and leave on the *Create Quick Letter on Post* checkbox on the lower right of the screen
4. Click on Post Payment and Close on the bottom of the screen
5. You will be asked if you want to Print letter now.
 - a. Answer Yes if this is the only entry
 - b. Answer No if you have more pledges and payments to enter and repeat the steps above for Pledges and Payments

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: 5742
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!

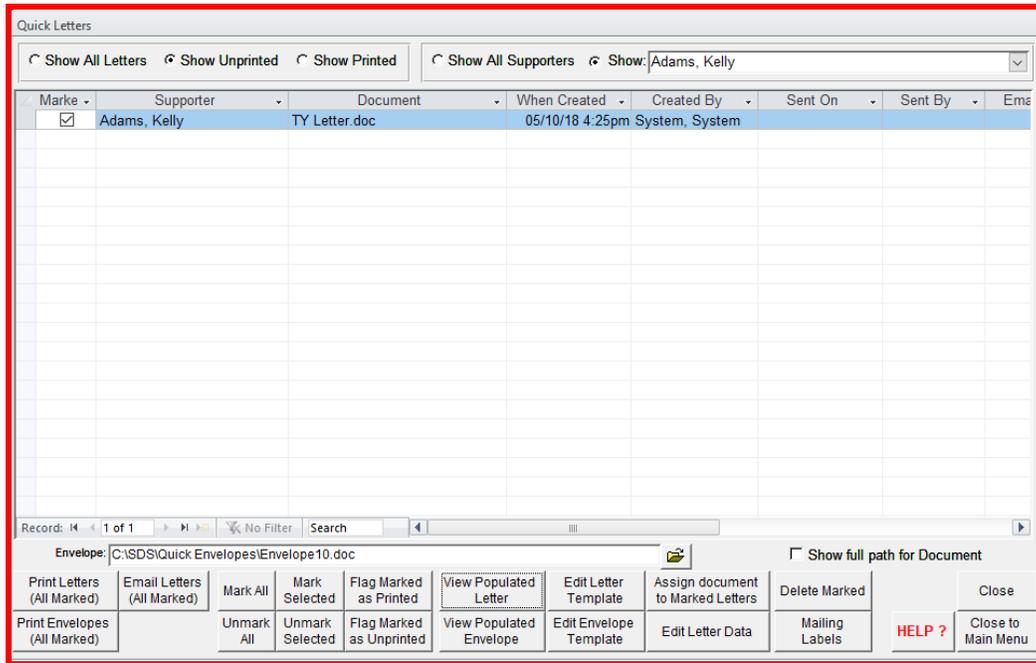
Create Quick Letter on Post

Thank You Letter Post Payment & Close Close

PRINT A LETTER:

In the Quick Letters screen you will see your supporter(s) and be able to choose a letter for them.

1. Click on the Marked checkbox
2. Double click on the empty field in the Document column to choose a letter
3. Click on the View Populated Letter button on the bottom of the screen to preview, modify and print the letter



4. In the Campaign/Appeals/Sub-Appeals you can assign default letters for specific Sub-Appeals which would make the letter automatically populate here
5. You can View Populated Letters individually by clicking on the line on the top that you want to see then clicking on View Populated Letters button
6. If all the letters are fine then click on Print Letters (All Marked)
7. Use the View Populated Envelopes if you want an envelope
8. When all letters are printed and you are finished with this Quick Letter batch then click on the Flag Marked as Printed button on the bottom. This will place a date, time and comment that the letter was printed in each of the appropriate supporters Comment tab on the Supporters screen.