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### **Supporter Donation System Quick Tips Solicitation Notices**

To use this feature a person must be entered into the database as a Supporter, given the Classification of Solicitor and also be setup as a User of the database.

These people can then setup things to do or solicitations and receive reminders about them upon entering the program. We will use Beth Johnson as our example person.

1. Click on Supporters button on the Main Menu
  2. Click on the Add Supporter button on the bottom of the Supporter Search screen
  3. Fill in the Title (Ms.), First (Beth), Middle, Last (Johnson)
  4. She is a Direct Supporter
  5. Click on the Continue button on the bottom of the screen
  6. Fill in her address, email and phone information
  7. If she has a Solicitor then choose that person from the Primary Solicitor dropdown list
  8. Select the All Individuals Classification because Beth Johnson is an Individual person
  9. Click on the Save button on the bottom of the screen, this will take you to the Supporters screen
  10. Click on the Classifications tab at the top of the Supporters screen
  11. Add Beth Johnson to the Solicitors Classification by double clicking on the Solicitors Classification in the right column, this will move the classification from the right to the left
  12. Close the Supporters screen and close the Supporter Search screen to the Main Menu
  13. Click on Users on the Main Menu
  14. Click on Add User in the bottom left corner
  15. Fill in Beth Johnson in the First and Last name and assign Beth a password or have Beth do this herself and click the Add button
  16. On the Users screen choose from the 'This user is this solicitor' dropdown Beth Johnson
  17. Choose the number of Days that Beth wants Advance warning when solicitations are due
  18. Choose the number of Days that Beth wants to Ignore incomplete solicitations
- NOTE:** As an Administrator of the Supporter Donation System software you need to determine if the people who will be using the program to enter and receive Solicitation Notices will also have access to other areas of the program and that should be done at this time.
19. Click on the Security tab at the top of the Users screen
  20. Click on each line item on the left of the screen and you will see that for each line item you get a choice of features in the program that can be turned on or off with a check mark – you need to click on all of the line items on the left and determine what you want each of these solicitors to be able to see and do in your database. Call Vision for more detailed information here 888-425-6964.
  21. Close to the Main Menu

## **Supporter Donation System Quick Tips Solicitation Notices (Continued)**

Once you are complete with the adding of your person, making them a solicitor, making them a user and setting their permissions, then they can begin creating solicitations or to-do's

22. Click on the Tasks (Solicitations) button on the Main Menu

This screen is sizable – click and drag on the blue border or double click on the blue title bar near the word Tasks (Solicitations) to maximize the screen

a. This screen can be configured to show different items on the screen or not – click on the Configure Form button on the bottom of the screen and choose which items you want Hidden

23. You can view solicitations for any chosen date range; for all or any single solicitor; campaign, solicitation type (phone, email, meeting, etc)

24. To add a new solicitation put your cursor in the Date box and type in the date of the solicitation (t on your keyboard will enter today's date)

25. Fill in the time if needed

26. Fill in the solicitation type (additional Solicitation Types can be added in Organization Information on the Task (Solicitation) Types tab)

27. Choose the Supporter that the solicitation is for

28. Fill in the Solicitors name

29. Choose the Camp/Appeal/Sub-Appeal that the solicitation is related to

30. Fill in any comment needed

31. Push the tab key until you are on the next line down and enter the next solicitation

32. IF you need to enter the same solicitation for a large group of people, then

33. Click on the Create Batch Tasks button on the bottom of the form

34. This screen will allow you to choose a set of people from your database using the Supporter Selection Engine (SSE)

35. Then you will choose the Solicitation Type (mail, email, phone, etc)

36. Choose the Solicitor (Beth Johnson)

37. Choose the Cam/App/Sub-Appeal

38. Fill in a Comment

39. Then click on the Record Solicitations button on the bottom of the screen

40. Answer Yes when asked to confirm

41. Click OK at the All Done message

42. Click the Close button on the Batch Solicitations To Be Created screen

43. You will be back at the Tasks (Solicitations) screen and see a list of your solicitations or to-do's

44. You can print a list with the Solicitations Report or the Hardcopy button at the bottom of the screen

45. Once you have all of these parts in place and the User (Beth Johnson) comes in the next day or next week and enters the program she will get a popup upon entering the program that says

**“You have x open solicitations! Do you want to view them now? Yes No”**

46. If she chooses yes, she will be taken directly to the solicitations screen

47. If she chooses no, she will enter the program to the Main Menu and she can view her solicitations later by clicking on the Solicitations button on the Main Menu