



## Vision Computer Programming Services, Inc.

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### Supporter Donation System Quick Tips Solicitors

Solicitors are those supporters who go out and raise money for your organization. In the Supporter Donation System a supporter becomes a Solicitor by being placed in the 'Solicitor' Classification. Then each solicitor has a group of people who they will solicit for contributions.

#### CREATE A SOLICITOR

1. From the Main Menu, click on Classifications
2. Click on the Find Classification dropdown, choose Solicitors
3. Choose the supporters in the right box who are not a member and add them to the Solicitors classification
4. Close the Main Menu

#### ADD SUPPORTERS TO A SOLICITOR

1. From the Main Menu, click on Solicitors
2. Click on the Select Solicitor dropdown and choose the solicitor you want to add supporters to
3. Choose the supporters in the right box who are not supporters under the chosen solicitor and add them to the Solicitors on the left
4. You can add more than one supporter by holding down the CTRL key on the keyboard and selecting more than one and then click on the Add button in the center

OR

5. In the Supporters screen, click the Names tab
6. In the top right choose the Solicitor for Supporter and click Primary

**RE-ASSIGNMENT ACTIONS** – this tool is used to Copy, Move or Remove supporters from one solicitor to another

**Hardcopy** – allows you to easily see the Supporters that are tied to a particular Solicitor and information about their pledges and payments.

Vision's Organization Supporters And Solicitors				
Solicitor		Total Pledged	Total Paid	Last Pledge
Supporter				
<b>Adams, Rodney</b>				
Cranen, Jay		\$100.00	\$100.00	\$0.00 06/22/18
Hill, Jacqueline		\$20.00	\$20.00	\$0.00 09/04/18
Holmer, Craig		\$15,050.00	\$15,050.00	\$0.00 11/29/18
Marchman, Ray		\$25.00	\$25.00	\$0.00 06/22/18
Schueler, Wendy		\$500.00	\$500.00	\$0.00 06/07/18
Staller, Mike		\$4,600.00	\$4,600.00	\$0.00 09/10/18

- Solicitors can be used to build the Simple and Advanced Pledge Summary Reports on the Donations tab in the Reports section of the program.
- Solicitors can also be tied to Users that log on to the database and receive solicitation notifications when the sign in.