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Supporter Donation System Quick Tips Campaigns / Appeals / Sub-Appeals

Campaigns, Appeals and Sub-Appeals are the foundation of how your organization achieves the financial goal.

A **Campaign** is a series of Appeals and Sub-Appeals.

An **Appeal** is the manner in which you ask your supporters to make contributions.

A **Sub-Appeal** is a division of an appeal and more precisely defines an appeal.

When you enter this screen the Campaign will always be on All Campaigns and you will need to choose a specific Campaign in order to view information about the Appeals and Sub-Appeals related to that Campaign. You can also select a specific Campaign and use the Set as Default button to have the campaign always appear upon opening this section.

On any of the screens that are visible in table format such as the Appeals Summary tab from the Campaign dropdown you can:

- Right click on the small grey box on the top left corner and choose to copy, sort and/or format the font in the table
- Sort by any column in the table by right clicking on the column header and choosing your sorting option
- Adjust the column width by clicking and dragging the vertical line dividing each column header to the desired width
- Double click on many of the fields to take you to the corresponding information about that field

Preview and Print options are available on ALL of the screens in the Campaigns, Appeals and Sub-Appeals section

CAMPAIGNS

1. From the Main Menu, click on the Campaigns/Appeals/Sub-Appeals button
2. Click on the Campaign dropdown at the top of the screen to see what is available – if your campaign is not listed then-
3. Click on Add Campaign button on the bottom to add a new campaign
4. Fill in the Campaign name, abbreviation (used where space is limited) and the goal
5. Click on Add
6. The Appeals Summary tab will show a list of Appeal information for the chosen Campaign. Please see below on adding new appeals.
7. Click on the Notes / Comments tab and fill in any additional information about this Campaign that is needed

NOTE: Choose a Campaign and click on the Set as Default button on the Campaigns/Appeals/ Sub-Appeals screen to set a specific Campaign from the dropdown as your default

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APPEALS

1. Click on the Appeals dropdown at the top of the screen to see what is listed - if your appeal is not listed then:
2. Click on Add Appeal button on the bottom to add new Appeals
3. Fill in the Appeal name, abbreviation (used where space is limited). The description, goal, date and time are OPTIONAL fields. We recommend entering the year followed by the name to keep data entry easy and clean. Example: 20XX Annual Dinner
4. Choose a Default Program NOTE: this is where the money is assigned as it comes in
5. Choose whether or not to Allow Directed Pledges which allows the User to choose any Fund/Program when adding pledges
6. Verify that the box is checked for Active Appeal. NOTE: You will turn off the Active Appeal checkbox after a year or two so when you are adding new pledges. Your older appeals will not show in the list after making them in-active. You will still be able to report on these appeals.
7. Fill in the first Sub-Appeal Name and Abbreviation here
8. Turn on the check for Allow Guest List if this Appeal will have a guest list
9. Turn on the check for Allow Items for Sale if this Appeal is related to an Auction
10. Click on Add
11. The Sub-Appeals Summary tab will show a list of Sub-Appeal information for the chosen Appeal
12. Click on the Notes / Comments tab and fill in any additional information about this Appeal that is needed
13. Click on the Event Tables tab to create tables for your event
 - a. Type in a Table #, Table Name, Table Abbrv and # of Seats for each table at your event
 - b. Each time you type in a new table a new blank line will become available
 - c. Click on the Duplicate Table to create many tables at one time NOTE: the Table Names will simply be numbered
 - d. You can also name the seats for each table on the right

NOTE: Choose an Appeal and click on the Set as Default button on the Campaigns/Appeals/Sub-Appeals screen to set a specific Appeal from the dropdown as your default

NOTE: You can select to only include data from Active Appeals which make the list shorter to choose from on various screens.

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SUB-APPEALS

1. Click on the Sub-Appeals dropdown at the top of the screen to see what is listed. The sub-appeal that you entered upon Appeal setup will be listed. If you need to add additional sub-appeals, then:
2. Click on Add Sub-Appeal button on the bottom to add new Sub-Appeals
3. Fill in the Sub-Appeal name, abbreviation (used where space is limited). NOTE: The date and time fields are OPTIONAL.
4. Choose a Default Program NOTE: this is where the money is assigned as it comes in
5. Choose whether or not to Allow Directed Pledges which allows the User to choose any Fund/Program when adding pledges
6. Choose whether or not to Allow Guest List
7. Choose whether or not to Allow Items for Sale (used for auctions)
8. Click on Add
9. The Pledge List will show all contributions for this sub-appeal
10. The In-Kind Contribution List will show all in-kind contributions for this sub-appeal
11. Click the Notes/Comments tab and fill in any additional information for the Sub-Appeal that is needed
12. The Item Categories tab allows you to categorize any items for an auction such as restaurants, men's, women's, children's, etc.
13. The Auction Items for Sale tab lists existing items and allow you to add new items for the auction
14. The Guest List tab shows the guest for this sub-event.
15. The Attendees tab shows the people who have been added to the Guest List - these people can be assigned to seats and given bidder numbers

NOTE: Choose a Sub-Appeal and click on the Set as Default button on the Campaigns/Appeals /Sub-Appeals screen to set a specific Sub-Appeal from the dropdown as your default

GUEST LIST/TICKET PURCHASES

Guest Lists can be created for people invited to your Appeal/Sub-Appeal

1. Click on Add to Guest List button on the bottom of the screen
2. Choose a Supporter from your list
3. Optional: Assign a solicitor for this purchase
4. Optional: Fill in a comment
5. Check the RSVP received; fill in the # of Tickets, the Purchase Amount, Value Received (optional) and the Method of Payment.
6. Click on the Purchase Now! Button.
7. You will see the name of your supporter in the First Name, Last Name, Supporter box.
8. Add the additional attendees in the fields.
9. Check the Bidder box if these supporters will be bidding at your event.
10. Manually assign a bidder number or click the Auto-assign bidder number.
11. Click on Next Purchase to enter in the next purchase.
12. If you have entered in tables for your event:
 1. Click on the Make/Check Seat Assignment button.
 2. Select a table on the left hand side.
 3. Click on the Seat All button to seat these attendees at your specified table.
 4. Click close.

NOTE: It is recommended that all guests receive a bidder number before the auction event

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ITEMS FOR SALE

When in-kind items are received, they can then be sold to supporters in exchange for contributions. The organizing and sale of 'Items for Sale' is usually named an Auction (silent or live).

Not all In-Kind items will become 'Items for Sale'.

A single item for sale may be comprised of numerous in-kind items. Example: A Theater Gift Basket might include a limo ride, dinner for 4, 4 theater tickets and cocktails at the theater. Each of these individual items may have been contributed by different supporters.

The first step is to receive In-Kind items from your supporters in the supporters screen.

In-Kind Items = Limo ride from John Smith, dinner for 4 at ABC Steak House, theater tickets for 4 from Tampa Bay Performing Arts, etc.

Item for Sale Example = Night on the Town

The next step is to create the Items for sale

1. Click on the Add Auction Item for Sale button at the bottom of the Campaigns/Appeals/Sub-Appeals window after you have chosen the specific Sub-Appeal that the In-Kind items were contributed to
2. Click on the Components tab to see all of the available In-Kind Items
3. Type an Item Name in the top left box
4. The Sub-Appeal will automatically fill in based on the choice you made in number 1 above but can be changed if needed
5. Click back to the Components tab to add components to the Item
6. Double click on each item you want to add to this Item for Sale
7. Click on Recalculate All button
8. On the Item Info tab you can edit any of the information as needed

You now have a new Item for Sale for your Auction