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Supporter Donation System Quick Tips Classifications

The Classifications section is used to classify or group your supporters together. Classifications can be created for mailings, for amounts of dollars given, where the persons name was acquired, what appeals the person participates in or anything else you can imagine.

1. From the Main Menu, click on Classifications
2. Click on the Find Classification dropdown to view what classifications are available in the system
3. One of the options for Classifications is to Auto-Add new Supporters to this Classification. This means that as you add new supporters they will automatically get added to the chosen classification. This is helpful if you have a new mailing list of 100 or 500 people and are going to sit down and enter them all at once. It saves a step on data entry.
4. The System Classification checkbox means that this classification cannot be changed or deleted as it is required by the Supporter Donation System.
5. The large left box are the members of a classification
6. The large right box are all the supporters in the system who are not members of the classification you are currently viewing on the left
7. You can move supporters in or out of a classification by clicking on their name and clicking on the Add or Remove buttons under the corresponding boxes or by double clicking on their name
8. You can select multiple people by holding down the CTRL key on your keyboard and clicking on multiple names in one of the boxes then click on the Add or Remove box accordingly.

Add Classifications

1. Click on the Add Classification button on the bottom to add a new Classification
2. Type the new name in the Classification Name box in the top left
3. Press Enter on your keyboard then begin adding supporters to the classification

Delete Classifications

This option removes the members from the classification then deletes the classification. It does NOT delete the supporters from the system.

Re-Classify Actions

Re-Classify Actions is a tool used to Copy, Move or Remove supporters from one classification to another.

Classifications can be used to build any reports in the reports section of the program