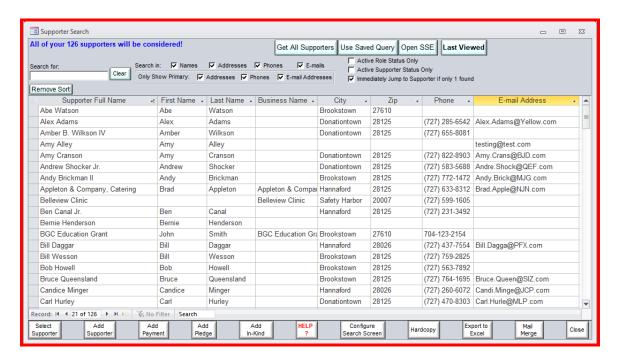


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## Supporter Donation System Quick Tips Supporter Search

The Supporter Search screen is where you will search or look up your supporters.



- This Search screen is sizable click and drag the bottom right edge of the screen and adjust it to the size that you like.
- On the top left you will see the total number of supporters that are being considered or shown.
- To search or produce a list of ALL supporters in your database click on the Get All Supporters button.
- The Use Save Query button allows you to search by a query that you previously saved from the Supporter Selection Engine.
- The Open SSE button allows you to narrow your search by any of the choices available there.
- Click the Last Viewed button to quickly get back to one of the last 10 supporters that you viewed.
- To search for a specific last name or business name, type that name (or any part of the name) in the Search for box and press Enter on your keyboard and you will get a list of people that contain the name or business name.

- Information can be searched in Names, Addresses, Phones and E-mails. These options become available if those items are chosen to show on the Configure Search Screen.
- Choose to show only Primary or all addresses, phones or e-mail addresses. NOTE: if you are not selecting Primary Only then you may see your supporters listed multiple times if they have more than one address or phone or email.
- You can optionally select the checkboxes for Active Role Status or Active Supporter Status only to only view active supporters.
- Check the box to Immediately Jump to Supporter if only 1 found to make the searching faster.
- Right click on any of the column headers and sort Ascending or Descending by that column.
- Click on any of the column headers and drag the column into a different position to change the order of the columns.
- Adjust the column width by clicking and dragging on the vertical line separating the column headers.
- Right click on any of the data lines and choose Format, then choose Font and change the Font, Style, Size or Color.
- To go to a Supporters record click on that supporters name and click on the Select Supporter button on the bottom of the screen or click on the supporters name and push the enter key or double click on the supporters name.
- Click on a Supporters name and use the buttons on the bottom of the screen to Add a Payment or Pledge or In-Kind item to that supporter.
- The Search screen can be configured to show different pieces of information about your supporters by clicking on the Configure Search Screen button on the bottom of the Supporter Search Screen and moving the Fields to show on the search screen from the right to the left.
- Use the Hardcopy or Export to Excel button to print or export the results of the search screen. The exported results can then be saved and emailed if needed.
- Use the Mail Merge button to merge letters, envelopes and to send mass email.