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Supporter Donation System Quick Tips Supporter Selection Engine

The purpose of the Supporter Selection Engine is to enable you to select or query "Supporters" based on a wide variety of criteria.

1. Choose a field name from the yellow outlined drop down box on the left.
2. Select criteria relating to this field that appears on the right side of the screen, where the help currently appears.
3. Each field will produce a different list of criteria to choose from.
4. To choose additional fields click on the small drop down box on the left to choose 'and' 'or' for the next field.

And = the supporter must be part of both criteria to be selected

Or = the supporter must be part of at least one but could be both criteria to be selected

5. Select criteria relating to this field and so on

There are many other options available in the selection engine:

- Move Up or Down changes the order of the field you have chosen
- Show Parentheses feature allows the user to state very explicit selection rules
- Description of Criteria Selected allows you to type the criteria you have chosen in order to show the information on reports
- The Clear button will clear the fields you have chosen so you can start a new request for data
- The Load button will load a previously saved Query
- The Save button saves a query that you built with an existing name
- The Save As button will save a query with a new name
- The Classification Tool uses the current Supporter Selection and adds or removes them from a new or existing classification
- The Count button provides a count of the supporters for the criteria you have chosen in the Selection Engine
- The Continue button will take you to a chosen report when you enter the Supporter Selection Engine from a report prep screen

Supporter Donation System Quick Tips Supporter Selection Engine, Continued

Example Query 1:

List all Supporters that are classified as a Business and have donated more than \$500 in 2018.

From the Main Menu click the Supporters button

In the Supporters Search screen click the Open SSE button and choose the following:

Classifications = All Businesses

And

Payment = see below

Supporter Selection Engine

Select Supporters Where:

Classification [v]

[v] [v]

Move Up

Select a classification or classifications below:

Classification	Sel
All	<input type="checkbox"/>
All Businesses	<input checked="" type="checkbox"/>
All Individuals	<input type="checkbox"/>
Alumni	<input type="checkbox"/>
Bank Funding	<input type="checkbox"/>
Bankers	<input type="checkbox"/>
Corporations	<input type="checkbox"/>
Development Survey Completed	<input type="checkbox"/>
Gala Mailing List - 2018	<input type="checkbox"/>
Gave To Capital Campaign	<input type="checkbox"/>

Only show if Active

Select All

Select None

Supporter Selection Engine

Select Supporters Where:

Classification [v]

And [v] Payment [v]

[v] [v]

Move Up

Move Down

Payments

Select

Single Payment Total of Payments

Select Dates

Between 01/01/2018 [v] [v] [v]

And 12/31/2018 [v] [v] [v]

On or Before [v] [v] [v]

Select Amount

Between \$0.00 [v] [v]

And \$9,999.00 [v] [v]

Greater Than or Equal To [v] \$500.00 [v] [v]

Select Method(s) of Payment: (If left unchecked, then all Methods will be considered!)

- Cash
- Check/Money Order
- Credit Card
- Electronic Funds Transfer
- Other
- Debit
- In Kind
- CC Processing

Show Parentheses

Description of Criteria Selected: [v]

Clear Load Save Save As **HELP ?** Classification Tool Count Continue Close

Supporter Donation System Quick Tips Supporter Selection Engine, Continued

Example Query 2:

List all Supporters that donated \$500 or more in 2018 only to the 2018 Golf Tournament Appeal.

From the Main Menu click the Supporters button

In the Supporters Search screen click the Open SSE button and choose the following:

Campaign Contributed to = see below

The screenshot shows the Supporter Selection Engine interface. On the left, under "Select Supporters Where:", the "Campaign Contributed to" dropdown is highlighted. The main area is titled "Select an appeal or appeals below:" and contains a list of campaigns. The "2018 Golf Tournament (2018 Annual Campaign)" is selected. Below this, the "Use the following criteria instead:" section is active, showing "Dates Between" from 01/01/18 to 12/11/18 and "Totals Between" from \$500.00 to \$9,999,999.00. The interface also includes buttons for "Move Up", "Move Down", "Select All", "Select None", and a "Description of Criteria Selected:" field.

The “Like” Operator is used with Campaign Contributed To, Email, Name, Phone, Primary Address, Primary City, Primary State, Primary Zip and the Solicitor fields on the left

Use the "%" character any time you want to represent zero or more characters.

For example, entering "New%" when searching the state field would find New York, New Jersey, New Hampshire and New Mexico.

Use the "_" (underscore) any time you want to represent a single character.

For example, entering "_ean" when searching first names would find all four-letter first names that end with ean (Dean, Sean, etc.).

If you want to represent a single character within a specified range, use "[]". You can state it one of two ways: "[a-f]" or "[abcdef]".

For example, entering "[C-P]arsen" when searching first names would find last names ending with arsen and beginning with any single character between C and P, like Carsen, Larsen, Karsen, and so on.

If you want to represent a single character NOT within a specified range, use "[^]". You can state it one of two ways: "[^a-f]" or "[^abcdef]".

For example, when searching last names, entering "de[^l]%" would find all last names beginning with de where the third letter is not l.