Supporter Donation System Quick Tips
Supporters

The Supporters screen has a variety if information and tasks that can be performed, which will be described below.

A supporter is associated with a Role. A role is the method the Supporter Donation System uses to describe a persons relationship with your organization. EXAMPLE:
   a. Nicole Dommer is a 'Direct Supporter' if she writes you a personal check
   b. Nicole Dommer is an 'Employee of' Vision Computer Programming Services if Vision writes you a check
   c. Nicole Dommer is a 'Spouse of' Michael Dommer if Michael writes you a check
   d. NOTE: Nicole can be all three roles in the system

Last Viewed button
Click this button to jump back to any one of the last 10 supporters records that you viewed.

General tab
The General tab contains basic information about the Supporter including name, business name, spouse information, status, gender, date of birth, addresses, phones and emails.

Add Supporter button
1. Click on the Add Supporter button
2. Fill in the Individual or Business name
3. Choose the supporters role as Direct Supporter or in a Role as from the dropdown
4. The program will automatically check for duplicate people in the program based on matching last name and first initial
5. If there is no match then click Continue and fill in the address, email, phone and choose a solicitor if there is one at this time
6. Choose either the All Individuals or All Businesses classification
7. Click on the Save button
8. On the main Supporters screen fill in any other information for this person or business such as partner name, gender, birth date, additional addresses, phone, faxes and emails
9. Addresses can change during a year – some people have a home in the north for the summer and a home in the south for the winter.
   a. The first address in the north is current as of April 15 each year – when you add the first address, check the box Is Primary Address and put the date it Becomes Primary On and check the Recurs Annually checkbox
   b. The additional address in the south will be current as of October 15 each year – when you add the second address do NOT check the box Is Primary Address, put the date it Becomes Primary On and check the Recurs Annually checkbox
   c. Each year on those dates the Primary address will change automatically to reflect the address appropriate for the date range based on your computer clock

Add Role button
All supporters are associated with a Role in the new Supporter Donation System. Each Supporter could play multiple roles. Some roles include Direct Supporter, Spouse of, Employee of and so on. All addresses, e-mails and phones are also associated with the supporters' role. So Nicole as Employee of Vision might have a different address and email as Nicole as a Direct Supporter

Delete Supporters and Delete Roles buttons
This option is available but not recommended certainly not if there are any pledge and payment records associated with the person or the role. There is a Supporter Status filed in which you can make those supporters In-Active and your reports can be chosen by Active supporters.

Quick Letter button
Quick Letters can be written to supporters thanking them for payments received on pledges given

Print Profile button
The Profile button will print a complete profile or give you the option to choose what parts of a profile you want to print for a chosen supporter.

Merge & Delete button
This tool is used if you have duplicated supporters and want to merge them together which will delete one. Always verify that you actually have a duplicate by checking the Role ID for each supporter at the top of the screen.

Supporter History button
This will show all the things that have been added, modified or deleted for this supporter's record.

Search Screen Sequence
Use the left or right arrows to scroll through supporters.

Record navigator
The Record Navigator on the bottom right corner allows you to scroll thru your supporters by Last name, First name or Search sequence (criteria on the Supporter Search screen).

Names tab
The Names tab includes information regarding: Role Status (Active, In-Active, etc.), Occupation, Industry, Job Title, Employer (used to indicate where an Individual supporter works - if that information is needed) and Source (where this supporter came from).

It also includes Names options for Display and Addressing.
These names are for displaying on reports and addressing on letters and envelopes.
Please contact our office for additional assistance with this area of the program.

You can also assign a solicitor to your supporters.

Classifications tab
The Classifications section is used to classify or group your supporters together. Supporters can be a part of as many classifications as needed. If a supporter is part of 5 different classifications and you choose those 5 classifications for a report the person will only show on the report 1 time. Double click on an Available Classification on the right to include a supporter in that classification or on the left to exclude them. You can also add a new Classification while adding Supporters if needed by using the Add Classification button on the bottom of the screen.

Comments tab
The Comments tab can be used to track any type of information about your supporters needed. There is a Comment Type that will allow you to choose which type of comment each entry belongs to. Go to Organization Information to create new Comment Types. Comments will automatically be entered if you Print a Quick Letter (Thank You) and Mark that letter as having been printed.

Custom Fields tab
Custom Fields are created in the Organization Information for the entire database and the data is then entered here for the supporters. Please contact Vision to discuss custom fields as we can usually fit a field into a classification or other area of the program.

Pledges tab
The Pledges tab shows you all the pledges and payments associated with each pledge. You can add new pledges, delete pledges and accept payments in the Pledges screen. More instructions are available on the Pledges screen. Each Pledge line on the left will show the corresponding payments on the right. Double click on a pledge to display all the information about that pledge. You can edit any part of the pledge on this screen. Click on the Hardcopy button to print a list of the existing pledges.

Payments tab
The Payments tab shows you all the payments and the distribution of payments against each pledge. You can add new payments and delete payments from this tab. Click on a Payment line on the left to display the corresponding pledges on the right. Right click on any of the columns to sort Ascending or Descending. Double click on a payment to display all the information about that payment. You can edit the payment date and method of payment or delete and re-enter the payment. Click on the Hardcopy button to print a list of the existing payments.

In-Kind Donations tab
The In-Kind Donations tab shows you the Date, Sub-Appeal and Total Value information about the in-kind donation. In order to view more information about the In-Kind donation simply double click on any part of the specific in-kind donation you are interested in. More instructions are available on the In Kind Donations screen.

Special Dates tab
In the Special Dates tab you can fill in birthdays, anniversaries or any other significant dates that you need. There is a report in the reports section, Supporters tab named Special Dates Report.

Endowments tab
In the Endowments tab you can keep track of any endowments or planned giving items for a supporter. There is a report available in the reports section, Miscellaneous Reports tab.

Solicitations tab
In the Solicitations tab you can keep track of solicitations that your solicitors perform. Fill in the date, time, solicitation type, solicitor, Camp/Appeal/Sub-Appeal and comment. The Solicitation Types are added in the Organization Information area of the program. The Solicitors are supporters that are in the Solicitor Classification. Camp/Appeal/Sub-Appeals are added from the main menu of the program. Comments can be anything you like. Double click on a line to view or change the solicitation details. To delete a solicitation, click on the line so it is highlighted, then push the delete key on your keyboard. There is a report in the reports section on the Miscellaneous Reports tab that will print this information.

Grants tab
In the Grants tab you can keep track of the Grants that you are awarded. Create tasks to be done regarding the grant and print the overall information for the Grant.

Misc tab
In the Misc (Miscellaneous) tab you will see the Meetings that the supporter was invited to and if they attended. You can also attach files or documents to a supporter's record by filling in a Date, Description and the double click on the File box to browse and attach the file. You can then later Print or View the file very quickly.