Welcome and thanks for viewing Part Two of “GiveCampus Basics: Viewing Assignment Records.” This training will cover how to access an assignment’s full record in the portal.

Let’s get started!
1. When you log into the volunteer portal, the landing page is your Assignments Snapshot. A previous video covered this page in detail.

2. At the bottom of your screen is your list of assignments.

3. In the row for any assignment, click “Go to Full Record” on the right side.

4. Like the Assignment’s Snapshot view, you can send your assignment an email, add a note, or call them on the phone from within the Full Record.

5. You can submit a note to update their giving propensity, or request to be unassigned from this classmate. Click “Request unpairing.”
6. As you scroll down the page, you can find detailed information for your assignment including their personal contact information, education history, employment history, and giving history to Yale.

7. Giving History will include the date of their gift and the allocation code within the Alumni Fund. The data for your assignment is updated daily directly from Yale’s donor database. If you ever notice outdated information, please notify your Alumni Fund staff contact so that we can update Alumni Records.
8. Further down in the Full Record, you can send your assignment an email by using one of the pre-written school email templates or writing your own message directly in the content editor.

9. Lastly, you can create a note regarding your assignment to indicate a gift conversation, update contact information, or any other important information. All notes, and emails sent through the portal, will be saved in the notes log for future reference.
Assignment Records help Agents view contact information, giving history, and track outreach!

As always, please do not hesitate to reach out to your Yale Alumni Fund staff contact should you have any questions or to request additional training.

Thanks for tuning in and thank you for all you do for Yale!