

GiveCampus Basics: Tracking Assignments



Yale Alumni Fund's
Volunteer Portal
Powered by GiveCampus



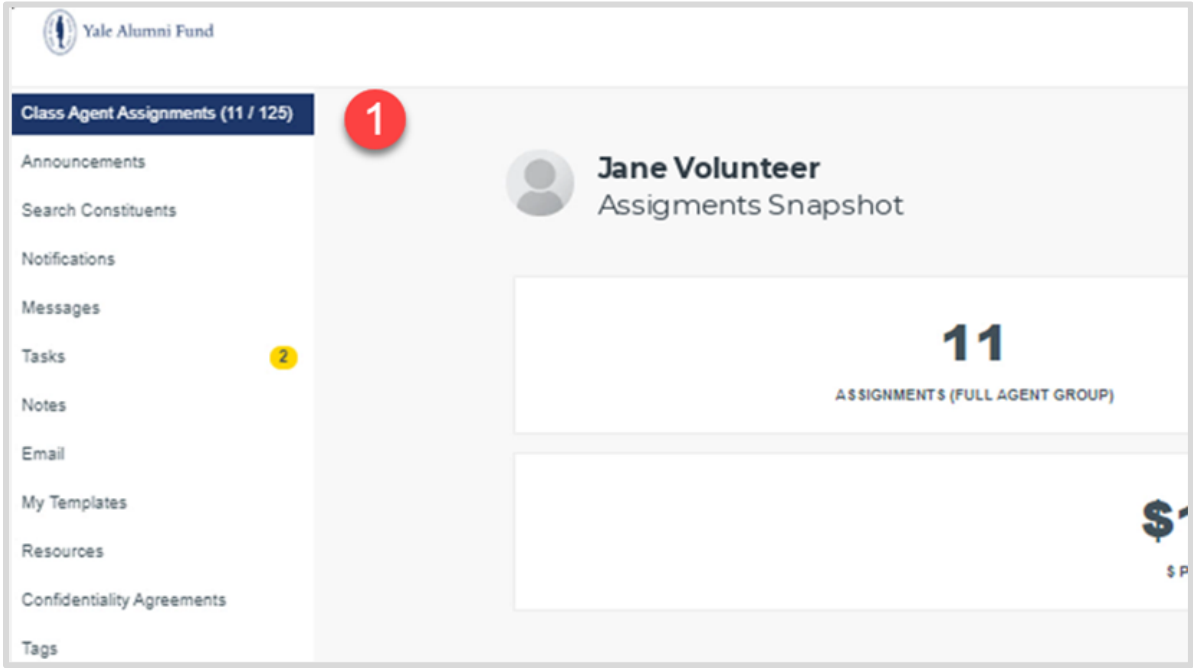
2.1 GiveCampus Basics: Tracking Assignments

Welcome and thanks for viewing “GiveCampus Basics: Tracking assignments” as part of the Yale Alumni Fund’s training series for how to use our Volunteer Portal, powered by GiveCampus.

We will walk through the Assignments Snapshot, which is the reporting feature that allows agents to view their fundraising progress for the fiscal year.

Let’s get started!

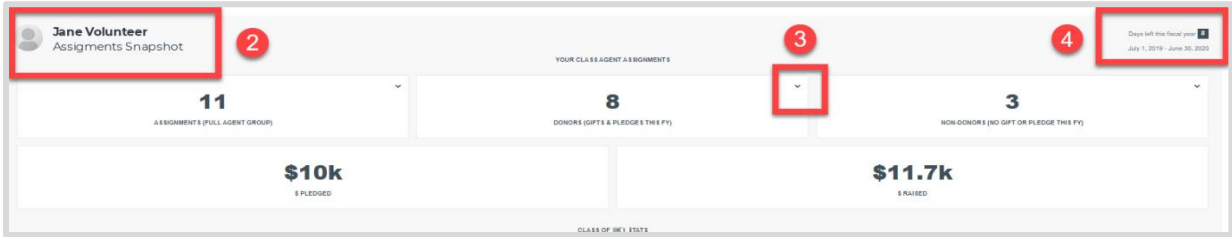
1. After logging in, be sure you are viewing the Class Agents Assignments feature.



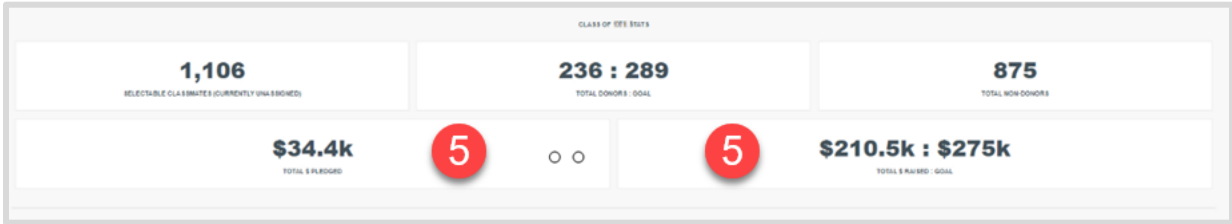
2. The Assignments Snapshot is separated into three dashboards. At the top is Class Agent Assignments, which includes your total number of assignments, and the number of current year donors versus non-donors.

3. Click the down carrots to display a list of names for each category.

4. There is a countdown to the fiscal year in the right-hand corner.

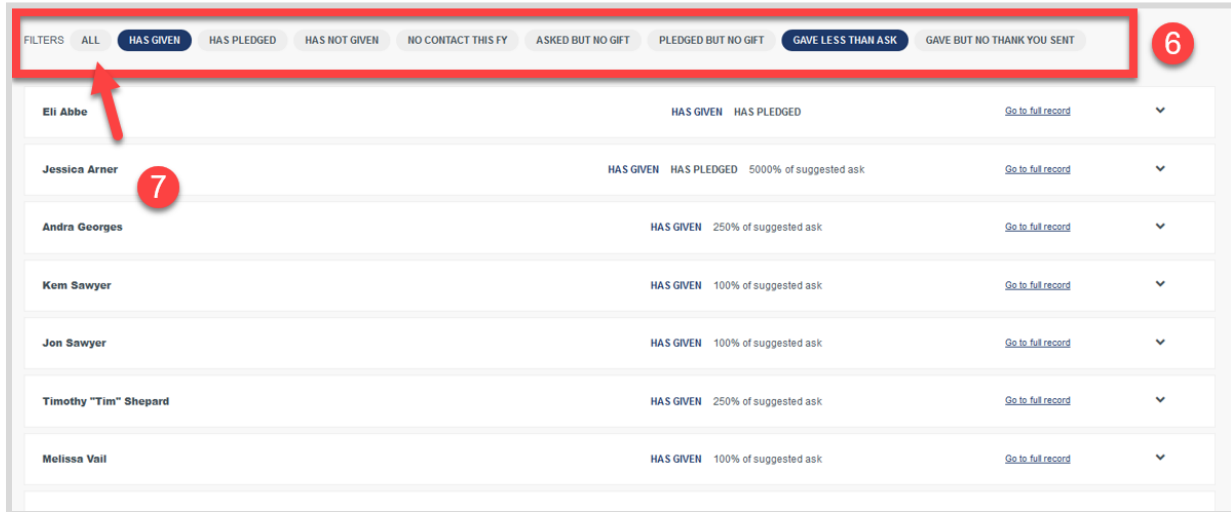


5. The center dashboard is your overall class statistics. This section displays participation and giving data for your class, but names of donors are not listed.



6. Finally, a dynamic list of individual assignments. You can utilize the data filters by clicking on the buttons. A filter is active when it turns blue. You can also combine filters to narrow your search.

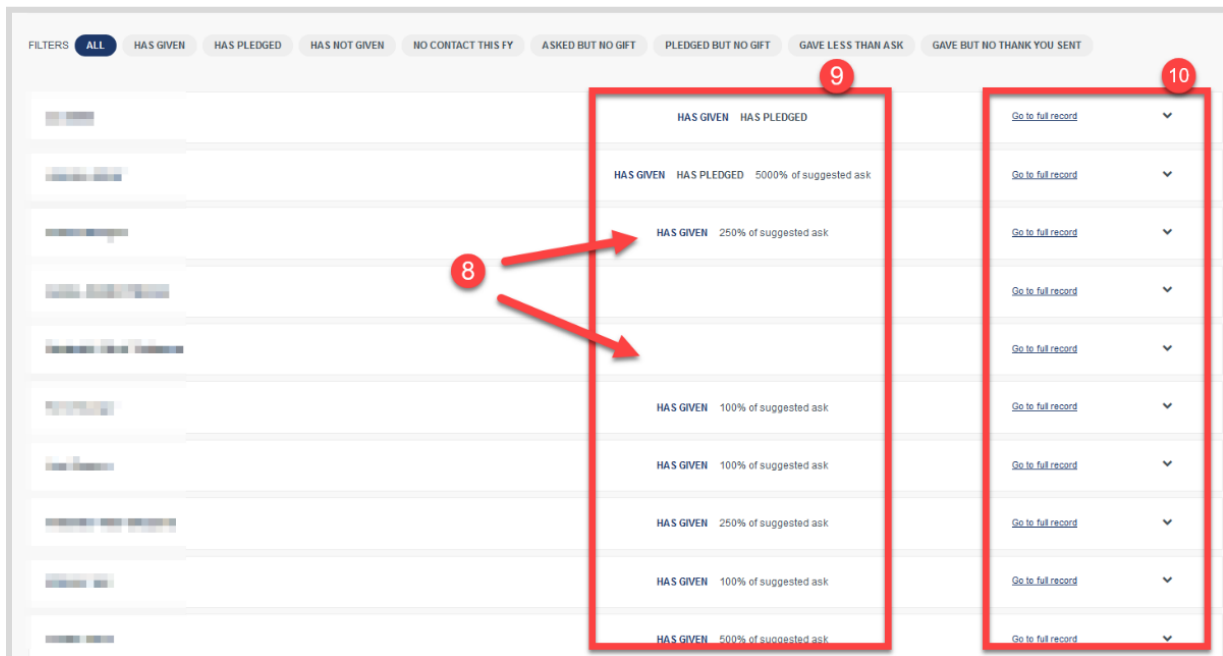
7. Click “All” to remove filters.



8. In your list, there are tags for “current-year donors” and no tags for “non-donors.”

9. Identify who has pledged, made a gift, and what percentage of their ask was given.

10. Future trainings will cover how to view each constituents Full Record from this list.



- Data is updated Daily
- Thank donors shortly after making their gift
- Stay tuned for upcoming trainings!

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In closing, remember:

1. Volunteer portal data is uploaded daily, directly from Yale's donor database.
2. Agents can track progress more closely and accurately than ever before.
3. The Assignments Snapshot allows agents to thank donors soon after gifts are made
4. Upcoming trainings will explore how to view complete donor records directly from the Assignments Snapshot.

As always, please do not hesitate to reach out to your Yale Alumni Fund staff contact should you have any questions!

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