## 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!

Yale Alumni Fund		
Class Agent Assignments (11 / 125) Announcements Search Constituents Notifications	1	Jane Volunteer Assigments Snapshot
Messages Tasks <mark>2</mark> Notes		<b>11</b> ASSIGNMENTS (FULL AGENT GROUP)
Email My Templates Resources		\$
Confidentiality Agreements Tags		

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.

Sane Volunteer Assigments Snapshot		Days left this fixed year   Aby 1, 2019
11 Азволинент в учал Асект сикону	8 CONVME (CATTS & RUEDORE THES PY)	3 NON CONCERT OR PLESSEE THIS PY
\$10k		\$11.7k

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.

0.431 0F 291 Juni					
1,106 RECESSAGE CLASSINGER (CURRENTLY VIN STORED)	<b>236 : 289</b> TOTAL DOMONS : GOAL			875 Tota, KOR COURTS	
\$34.4k	5	0 0	5	\$210.5k : \$275k	

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.

FILTERS ALL HAS GIVEN	HAS PLEDGED	HAS NOT GIVEN	NO CONTACT THIS FY	ASKED BUT NO GIFT	PLEDGED BUT NO GIFT	GAVE LESS THAN ASK	GAVE BUT NO THANK YOU SENT	6
Eli Abbe					HAS GIVEN HAS PL	EDGED	Go to full record	*
Jessica Arner				HAS GI	VEN HAS PLEDGED 5000	0% of suggested ask	Go to full record	*
Andra Georges					HAS GIVEN 250% of sug	igested ask	Go to full record	*
Kem Sawyer					HAS GIVEN 100% of sug	igested ask	Go to full record	*
Jon Sawyer					HAS GIVEN 100% of sug	igested ask	Go to full record	*
Timothy "Tim" Shepard					HAS GIVEN 250% of sug	igested ask	Go to full record	*
Melissa Vail					HAS GIVEN 100% of sug	igested ask	Go to full record	*

- 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.

FILTERS ALL HAS GIVEN	HAS PLEDGED HAS NOT GIVEN NO CONTACT THIS FY A SKED BUT	T NO GIFT PLEDGED BUT NO GIFT GAVE LESS THAN AS	K GAVE BUT NO THANK YOU SENT	10
		HAS GIVEN HAS PLEDGED	Go to full record	×
		HAS GIVEN HAS PLEDGED 5000% of suggested ask	Go to full record	*
		HAS GIVEN 250% of suggested ask	Go to full record	•
10.00	8		Go to full record	*
Sector Sectors		*	Go to full record	•
1000		HAS GIVEN 100% of suggested ask	Go to full record	•
in last		HAS GIVEN 100% of suggested ask	Go to full record	*
		HAS GIVEN 250% of suggested ask	Go to full record	*
-		HAS GIVEN 100% of suggested ask	Go to full record	*
		HAS GIVEN 500% of suggested ask	Go to full record	•



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.
- 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!