GiveCampus Basics: Viewing Assignment Records Part 1

Yale Alumni Fund's
Volunteer Portal
Powered by GiveCampus

2.2 GiveCampus Basics: Viewing Assignment Records (Part 1)

Welcome and thanks for viewing Part One of "GiveCampus Basics: Viewing Assignment Records." This training will cover how to quickly reference constituent data that can inform an Agent on how to effectively solicit, or thank, their assignments during the fiscal year.
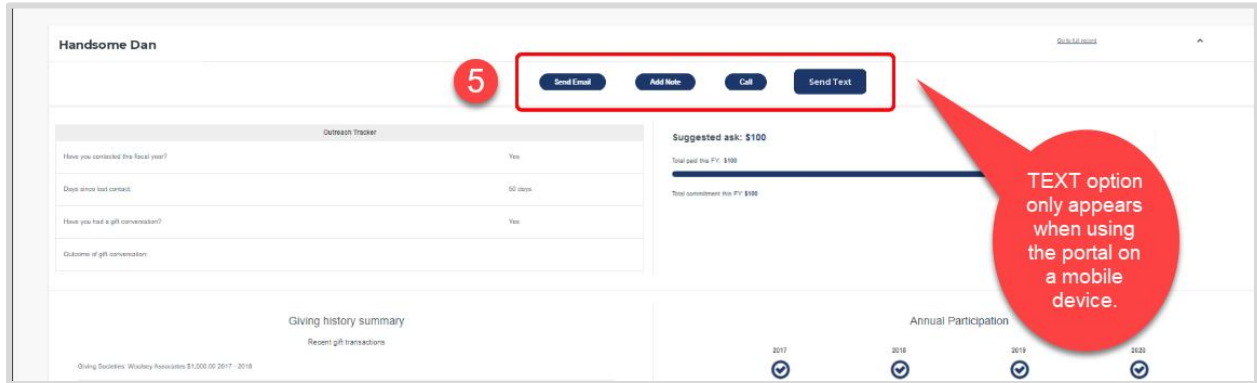
Let's get started!

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. For this example, let's filter on only assignments that have not yet made a gift during the fiscal year.

4. Click the down carrot at the end of each constituent row to reveal various outreach features and infographics.
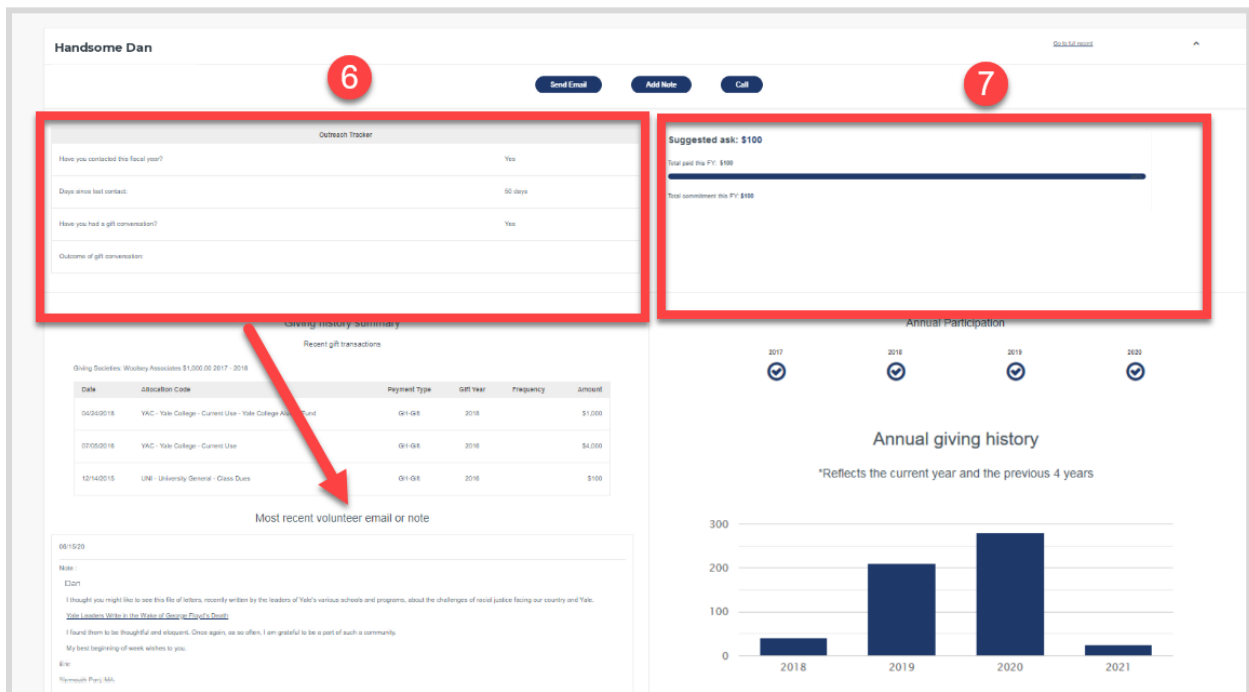
5. There's an option to **send an email** directly to your assignment from within the portal. **Add a note** to log any communication performed outside of the portal, such as a telephone call, text, or in-person conversation. **Call your assignment** on the telephone. *This option is only available if Yale has the constituent's mobile phone number on record.* It also works best when viewing GiveCampus on your mobile device. If you are on your mobile device, you will also see the option to **text your assignment**.

6. Next, the OUTREACH TRACKER displays any communications you've sent through the portal, or any notes you've logged. A copy of your most recent communication will appear at the bottom of the screen.

7. There is a FISCAL YEAR PROGRESS BAR, which shows your assignment's current year ask amount and their progress toward that amount.

8. A GIVING HISTORY SUMMARY displays recent gifts made and their designations.

9. Finally, an ANNUAL PARTICIPATION bar chart reflects gifts made during the most recent four fiscal years.

Part two of this training will review where to locate each assignment's full portal record.

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In Part 2 of this training, we will cover where agents can locate a constituent's full record in the portal.

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!