

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!

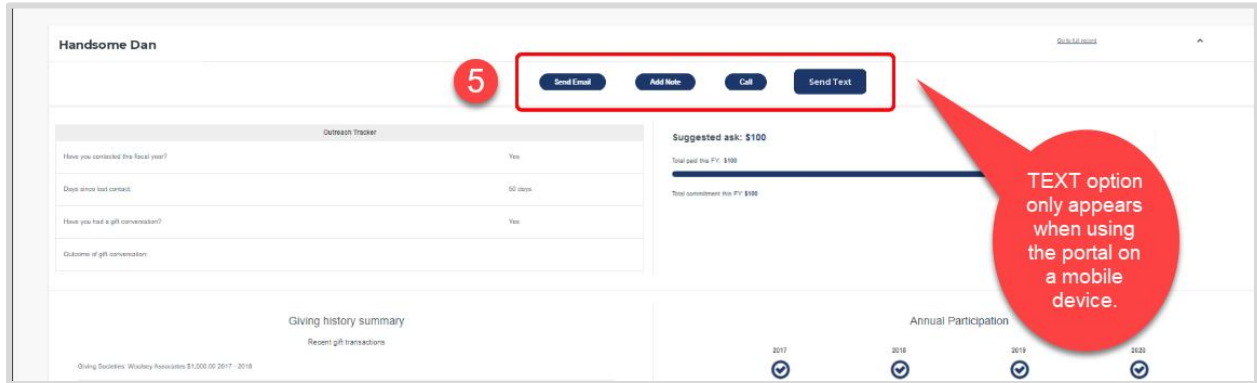
1. When you log into the volunteer portal, the landing page is your Assignments Snapshot. A previous video covered this page in detail.
2. At the bottom of your screen is your list of assignments.

The screenshot displays the 'Jane Volunteer Assignments Snapshot' page. At the top, a red arrow points to the user's name 'Jane Volunteer' and the page title. Below this, summary statistics are shown: 30 assignments (full agent group), 13 donors (gifts & pledges this FY), and 17 non-donors (no gift or pledge this FY). Financial totals include \$5.1k pledged and \$8.23k raised. Further down, it shows 1,216 selectable classmates (currently unassigned), 275 : 286 total donors - goal, and 946 total non-donors. At the bottom, a list of assignments is displayed with filters (ALL, HAS GIVEN, HAS PLEDGED, HAS NOT GIVEN, NO CONTACT THIS FY, A SAVED BUT NO GIFT, PLEDGED BUT NO GIFT, GAVE LESS THAN ASK, GAVE BUT NO THANK YOU SENT). A red box highlights the list of assignments, which includes names like 'Michelle Staben', 'Warren Staben', 'Stephen 'Steve' Wang', and others, each with a dropdown arrow.

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.

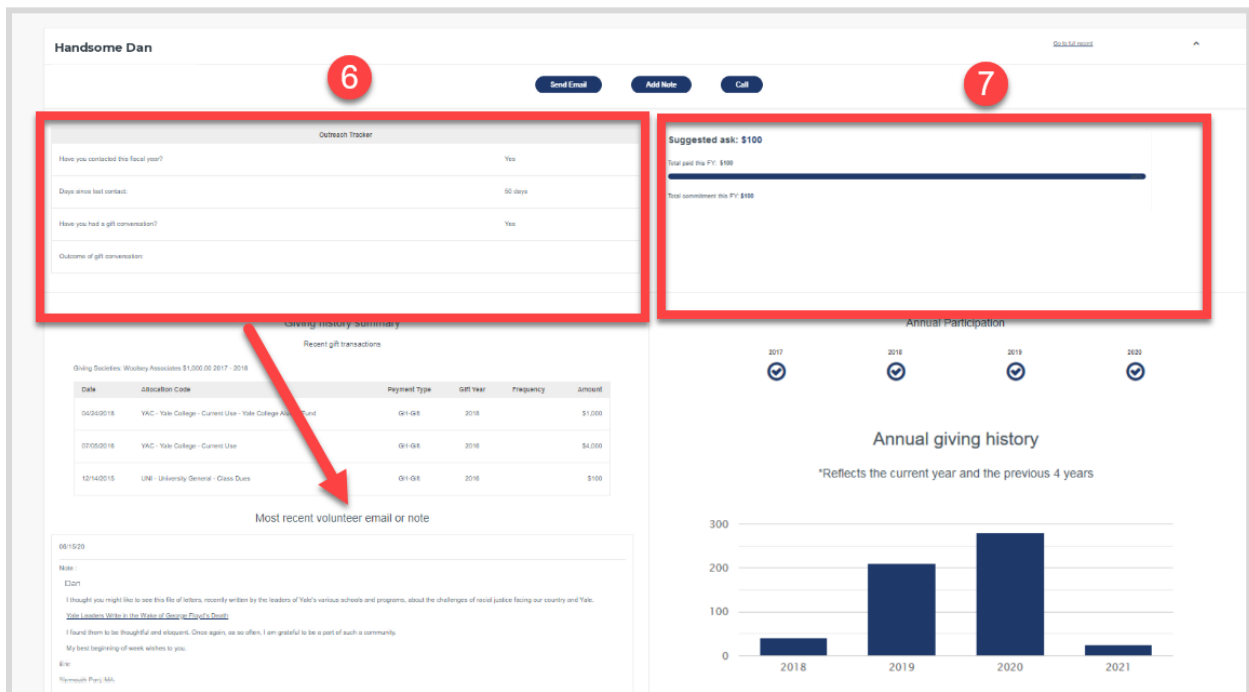
This screenshot shows the same 'Jane Volunteer Assignments Snapshot' page, but with filters applied. A red box highlights the filter dropdown menu, which is set to 'HAS NOT GIVEN'. Another red box highlights the list of assignments, which now only shows those that have not yet made a gift. The list includes names like 'Michelle Staben', 'Warren Staben', 'Stephen 'Steve' Wang', and others, each with a dropdown arrow.

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.

The screenshot displays a donor profile for 'Handsome Dan'. At the top, there are buttons for 'Send Email', 'Add Note', and 'Call'. Below this is an 'Outreach Tracker' section with a table:

Question	Answer
Have you contacted this fiscal year?	Yes
Days since last contact:	92 days
Have you had a gift conversation?	Yes
Outcome of gift conversation:	

A red circle with the number '8' is placed over the 'Outcome of gift conversation' row.

To the right is a 'Suggested ask: \$100' section with a progress bar. The bar shows 'Total paid this FY: \$100' and 'Total committed this FY: \$100'. A red circle with the number '9' is placed over this section.

Below the outreach tracker is a 'Giving history summary' section with a table of recent gift transactions:

Date	Allocation Code	Payment Type	Gift Year	Frequency	Amount
04/26/2018	VAC - Yale College - Current Use - Yale College Alumni Fund	GR - GR	2018		\$1,000
03/05/2018	VAC - Yale College - Current Use	GR - GR	2018		\$4,000
12/14/2015	UNK - University General - Class Dues	GR - GR	2016		\$100

A red box highlights this table.

To the right is an 'Annual Participation' bar chart showing giving history from 2018 to 2021. The chart shows a steady increase in participation from 2018 to 2020, followed by a decrease in 2021. A red box highlights the chart.

Below the giving history summary is a section with a date '06/15/20' and a message:

Name: [Redacted]
[Redacted]

I thought you might like to see this file of letters, recently written by the leaders of Yale's various schools and programs, about the challenges of racial justice facing our country and Yale. [View Letter Writing in the Wake of George Floyd's Death](#)

I found them to be thoughtful and eloquent. Once again, as so often, I am grateful to be a part of such a community.

My best beginning-of-week wishes to you.

EW
To: handsome Dan@yale.edu

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



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!