

GiveCampus Basics: Viewing Assignment Records Part 2



Yale Alumni Fund's
Volunteer Portal
Powered by GiveCampus



2.3 GiveCampus Basics: Viewing Assignment Records (Part 2)

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.

The screenshot shows the 'Jane Volunteer Assignments Snapshot' page. At the top, there are summary statistics: 30 assignments, 13 donors, and \$5.1k pledged. Below this, there are more statistics: 1,216 selectable classmates, 275 out of 286 total donors, and \$94.81k total pledged. A red arrow points to the 'Jane Volunteer Assignments Snapshot' header. A red box highlights the 'Go to Full Record' link in the assignment list. A red box also highlights the text 'Click on "Go to Full Record"'. A red box with the number 3 is also present near the assignment list.

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.”

The screenshot shows the 'Full Record' view for Dan 'Handsome' Example M.D. At the top, there are buttons for 'Send Email', 'Add Note', and 'Call'. A red box highlights these buttons. A red box with the number 4 is also present. At the bottom right, there are buttons for 'Submit Giving Propensity' and 'Request Unpairing'. A red box with the number 5 highlights these buttons. The page also shows personal information such as phone number, location, address, spouse, and education.

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.

Assigned to: Jane Volunteer (Class Agent)

Dan "Handsome" Example M.D.
Case of file

Submit Giving Propensity Request updating

Send Email Add Note Call

Tags: Filter's name for tag Create Tag

Personal

Phone Number: (716) 233-0000

Location: Rochester

Relatives: Bradshaw 1991, 1990; Mark 1990 - Child

Home Address: 850 Constance St, Rochester, NY 14610-1000 (United States)

Spouse: Benjamin S. Hooper

Address: 850 Constance St

Education

Majors: Psychology

Activities: 1990-1991, 1991-1992, 1992-1993

Class Year: 1990

Other Education: 1990-1991, 1991-1992

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.

Giving History

Last Gift Details: \$250.00 (P) - 11/17/2018 10:34

Pledge Balance: \$0

Pledges: None

Giving History: This program pays 100% via PY

Donor Status: Current Yale Donor

Date	Allocation Code	Payment Type	Gift Year	Frequency	Amount
07/21/2020	YAC - Yale College - Current Use - Yale College Alumni Fund	GH-Recuring Pmt	2021		\$25
08/20/2020	YAC - Yale College - Current Use - Yale College Alumni Fund	GH-GR	2020		\$200
11/18/2019	YAC - Yale College - Current Use - Yale College Alumni Fund	GH-GR	2020		\$100
11/17/2018	YAC - Yale College - Current Use - Yale College Alumni Fund	GH-GR	2019		\$100
11/18/2017	YAC - Yale College - Current Use - Yale College Alumni Fund	GH-GR	2018		\$100
11/18/2015	YAC - Yale College - Current Use - Yale College Alumni Fund	GH-GR	2017		\$100
10/31/2015	YAC - Yale College - Current Use	GH-GR	2016		\$100
11/22/2014	YAC - Yale College - Current Use	GH-GR	2015		\$50

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.

The image displays two screenshots from a web portal interface. The left screenshot is titled "Send Dan an Email" and features a "School Email Templates" section with various pre-written messages. Below this is a "Subject:" field and a "Message" editor with a rich text toolbar. A red arrow points from a circled "8" to the "Send Email" button at the bottom. Another red arrow points from the same circled "8" to the "Write your message here!" text in the message editor. The right screenshot is titled "Create a new note regarding Dan" and includes a "What type of note is this?" dropdown menu and a "When was this contact?" date selector. A red arrow points from a circled "9" to the "Save Note" button. Below this is an "Email & Notes Log" section showing a note with a photo of a building entrance. A second red arrow points from the circled "9" to this photo.

Assignment Records help Agents view contact information, giving history, and track outreach!



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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!