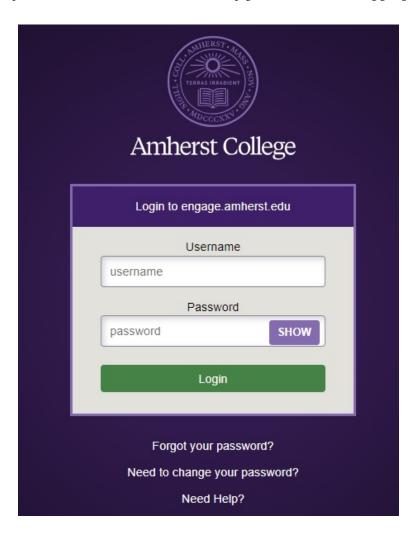**User Guide: Amherst Fund Volunteer Portal**
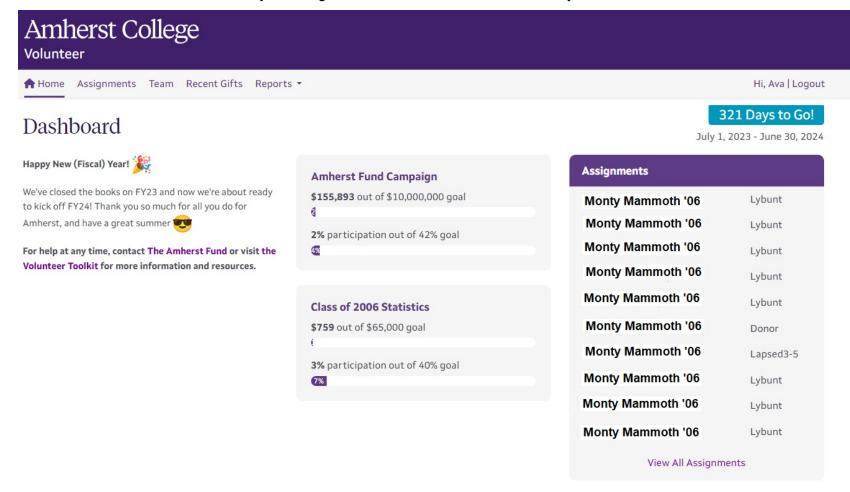*Updated August 22, 2023*

Login here: https://volunteer.engage.amherst.edu/

Please follow the on-screen instructions if you have trouble logging in with your credentials.

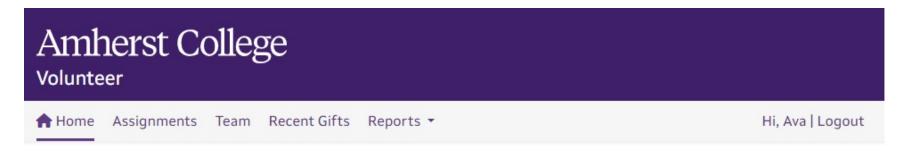**Upon logging into the portal for the first time, you'll be asked to review and sign off on the Advancement confidentiality policy. You will only be asked to review the policy upon the initial sign-in, and we will keep a copy for our records.*

Dashboard: Once you're logged in, you'll see your personalized dashboard with an announcement from AF staff (and relevant appeal info), AF and Class statistics, and a brief overview of your assignment list. We've also added a fiscal year countdown with dates for the current fiscal year.

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Dashboard

321 Days to Go!
July 1, 2023 - June 30, 2024

Happy New (Fiscal) Year! 🎉

We've closed the books on FY23 and now we're about ready to kick off FY24! Thank you so much for all you do for Amherst, and have a great summer 😎

For help at any time, contact The Amherst Fund or visit the Volunteer Toolkit for more information and resources.

Amherst Fund Campaign

$155,893 out of $10,000,000 goal

2

2% participation out of 42% goal

4%

Class of 2006 Statistics

$759 out of $65,000 goal

3% participation out of 40% goal

7%

Assignments

Monty Mammoth '06	Lybunt
Monty Mammoth '06	Lybunt
Monty Mammoth '06	Lybunt
Monty Mammoth '06	Lybunt
Monty Mammoth '06	Lybunt
Monty Mammoth '06	Donor
Monty Mammoth '06	Lapsed3-5
Monty Mammoth '06	Lybunt
Monty Mammoth '06	Lybunt
Monty Mammoth '06	Lybunt

View All Assignments

Main Navigation Bar: Use these tabs to navigate to different areas of the portal.

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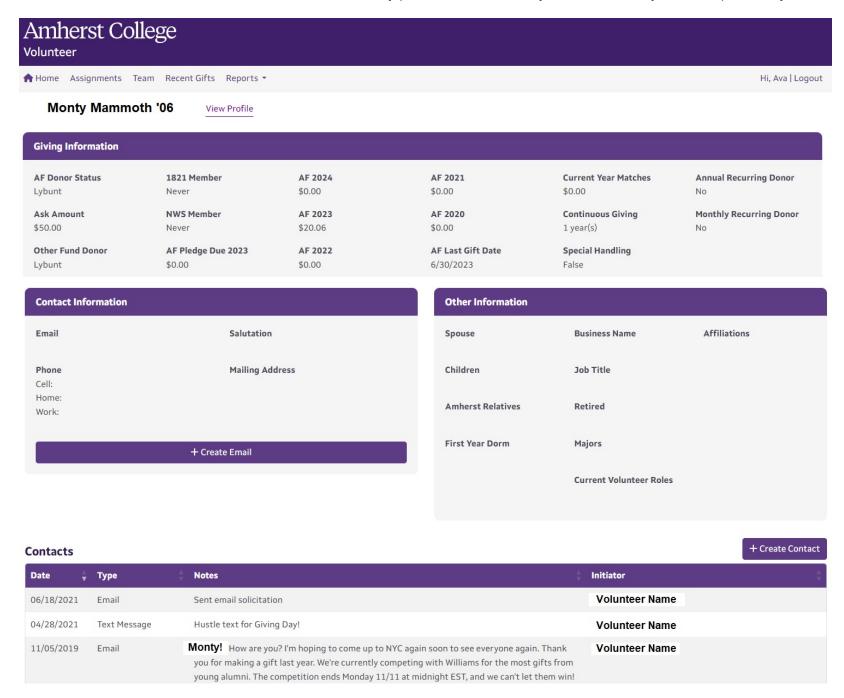
Assignments: This list shows your assigned classmates. You can click on each name and it will bring you to their profile card with additional information. To make changes to this list, please ask your class manager.

**Please note: At this time you may only click into the profile cards of classmates to whom you are assigned.

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Assignments

Search

Name	AF Donor Status	Ask Amount	AF 2024	AF 2023
Monty Mammoth '06	Lybunt	$50.00	-	$20.06
Monty Mammoth '06	Lybunt	$50.00	-	$100.00
Monty Mammoth '06	Lapsed3-5	$100.00	-	-
Monty Mammoth '06	Lybunt	$250.00	-	$250.00
Monty Mammoth '06	Lybunt	$200.00	-	$200.00
Monty Mammoth '06	Lybunt	$50.00	-	$10.00
Monty Mammoth '06	Lybunt	$50.00	-	$50.00
Monty Mammoth '06	Lybunt	$3,000.00	-	$3,000.00
Monty Mammoth '06	Donor	$250.00	$150.00	-

Profile Card: View detailed information for an assigned classmate. You'll see five years of AF giving and additional notes about giving history, as applicable. The portal will show you preferred contact information, affinities and activities (if we have them), and other helpful details about each classmate. Click "View Profile" to view their alumni directory profile. At the bottom you'll also see any contacts previously recorded via the portal.

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Monty Mammoth '06   View Profile

Giving Information

AF Donor Status	**1821 Member**	**AF 2024**	**AF 2021**	**Current Year Matches**	**Annual Recurring Donor**
Lybunt	Never	$0.00	$0.00	$0.00	No
Ask Amount	**NWS Member**	**AF 2023**	**AF 2020**	**Continuous Giving**	**Monthly Recurring Donor**
$50.00	Never	$20.06	$0.00	1 year(s)	No
Other Fund Donor	**AF Pledge Due 2023**	**AF 2022**	**AF Last Gift Date**	**Special Handling**	
Lybunt	$0.00	$0.00	6/30/2023	False	

Contact Information

Email	**Salutation**
Phone	**Mailing Address**
Cell:	
Home:	
Work:	

+ Create Email

Other Information

Spouse	**Business Name**	**Affiliations**
Children	**Job Title**	
Amherst Relatives	**Retired**	
First Year Dorm	**Majors**	
	Current Volunteer Roles	

Contacts   **+ Create Contact**

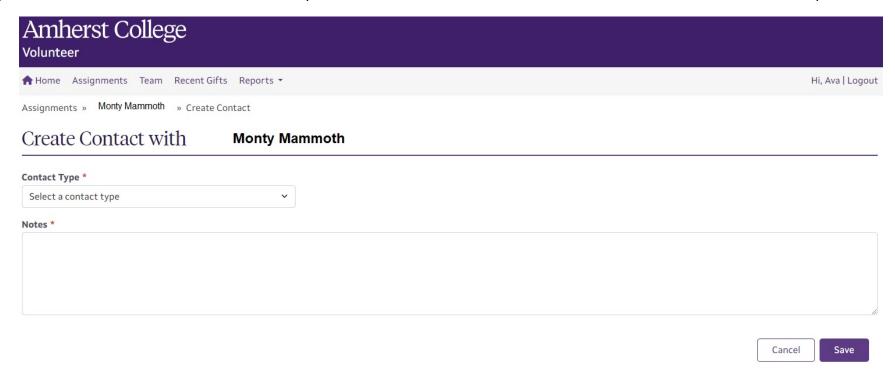| Date	Type	Notes	Initiator
06/18/2021	Email	Sent email solicitation	**Volunteer Name**
04/28/2021	Text Message	Hustle text for Giving Day!	**Volunteer Name**
11/05/2019	Email	**Monty!** How are you? I'm hoping to come up to NYC again soon to see everyone again. Thank you for making a gift last year. We're currently competing with Williams for the most gifts from young alumni. The competition ends Monday 11/11 at midnight EST, and we can't let them win!	**Volunteer Name**

Create Email: You may send an email to an assigned classmate while viewing their profile card. Click the "+Create Email" button and select an email template from the dropdown or write your own—you can edit the text either way! It will autofill with the preferred email address, and you can adjust that, too, if necessary. Add a subject line (email templates automatically add one for you), check your spelling/grammar, and hit send. A record of your email will then appear in the contacts section of that classmate's profile card.
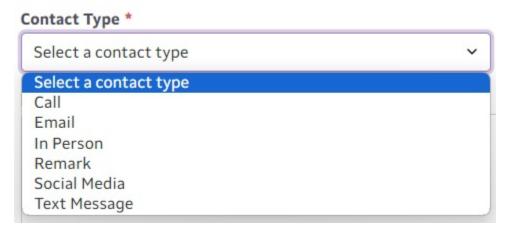
You may add text formatting, hyperlinks, and photos as you see fit to help make your email messages more compelling.

Create Contact: You may also create a contact note for an assigned classmate while viewing their profile card. You might use this option when you've had a phone conversation, text exchange, in-person chat, Zoom call, or other kind of connection that happened outside the portal. Please enter any relevant notes (or copy and paste in text from another location) into the notes box and click "save." A record of your contact will then appear in the contacts section of that classmate's profile card. Amherst Fund staff also have access to classmate contacts in the portal.

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Assignments »   Monty Mammoth   » Create Contact

Create Contact with   **Monty Mammoth**

Contact Type *

| Select a contact type   ⌄ |

Notes *

| |
| |
| |
| |

Cancel   **Save**

Use the dropdown to select the most appropriate contact type:

Contact Type *

| Select a contact type   ⌄ |

Select a contact type
Call
Email
In Person
Remark
Social Media
Text Message

Team: View the members of your Amherst Fund agent team and check their progress to goals. Click the "Email Team" button in the top right corner to send an email to the whole team.

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Team   [Email Team]

Search

[   ] [×]

Name	Role	Assignments	Participation	AF Dollars
Volunteer Name	Class Agent	13	8%	$50
Volunteer Name	Associate Agent	11	9%	$5
Volunteer Name	1821 Chair	19	5%	$400
Volunteer Name	Associate Agent	10	0%	$0
Volunteer Name	Associate Agent	24	0%	$0
Volunteer Name	Associate Agent	18	11%	$170
Volunteer Name	Associate Agent	31	6%	$60
Volunteer Name	Class Agent	30	0%	$0
Volunteer Name	Associate Agent	9	0%	$0
Volunteer Name	Associate Agent	10	0%	$0

Recent Gifts: Online gifts will show here until they are officially entered in the system. Please note that you will only be able to see gifts from your own class year, when made with a credit card via the online giving form where the donor includes their class year.

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Recent Online Gifts

This list includes anyone who has made a gift online over the past three days. Names on this report appear as they were entered through the online giving form. **After approximately two business days, you will see these individuals listed as donors on the other pages in the Volunteer Portal.** For the purposes of solicitation, you can consider these individuals donors. Please wait to send thank you messages until the gifts have been finalized. Thank you!

Search

[   ] [×]

Last Name ⇅	First Name ⇅	Class ⇅	Gift Date ⇅
		No data available in table	

Showing 0 to 0 of 0 entries   [<] [>]

Reports: Use the search bar to find classmates and view basic information in the browser window. Download the reports to view additional information.

Classmate Giving Report: View basic demographic and giving information for active and solicitable classmates.

Name	AF Solicitors	Donor Status AF	AF Ask Amount	AF Last Date of Gift	AF 2024	AF 2023	AF 2022	Note
Classmate		Sybunt	$50.00	11/12/2021	-	-	$50.00	
Classmate	AF Volunteer	Lybunt	$50.00	04/13/2023	-	$50.00	-	
Classmate		Never	$50.00	-	-	-	-	
Classmate		Never	$50.00	-	-	-	-	
Classmate	AF Volunteer	Lybunt	$50.00	12/17/2022	-	$25.00	$25.00	

Lybunt/Sybunt Report: View a list of classmates who gave last year (Lybunt) or the prior year (Sybunt).

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Lybunt/Sybunt - Class of 2006   [Download Excel Report]

Search

Name	AF Solicitors	Donor Status AF	AF Ask Amount	AF Last Date of Gift	AF 2024	AF 2023	AF 2022	Note
Classmate		Sybunt	$50.00	11/12/2021	-	-	$50.00	
Classmate		Sybunt	$50.00	04/26/2022	-	-	$50.00	
Classmate		Lybunt	$100.00	06/26/2023	-	$100.00	-	
Classmate		Lybunt	$50.00	02/13/2023	-	$50.00	$29.00	
Classmate		Lybunt	$200.00	04/13/2023	-	$100.00	-	