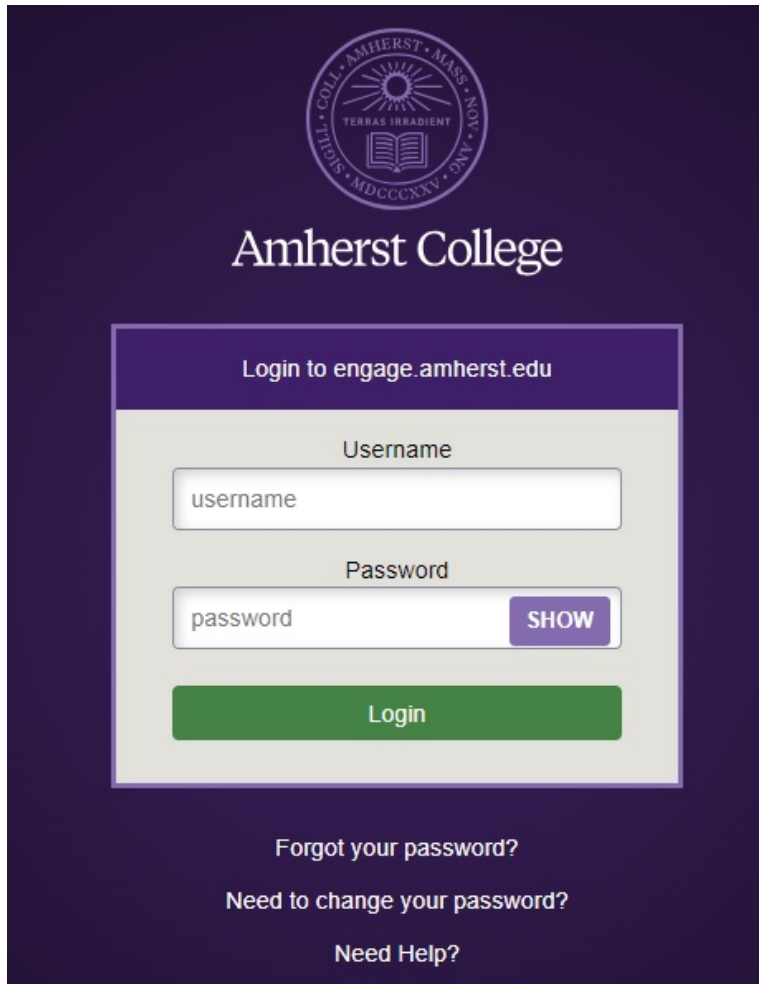


User Guide: Amherst Fund Volunteer Portal

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.



The image shows a login interface for Amherst College. At the top is the Amherst College seal, which features a sunburst and an open book, with the motto "TERRAS IRRADIANT" and the year "MDCCCXXV". Below the seal, the text "Amherst College" is displayed in a serif font. The main login area is a light gray box with a dark purple header that says "Login to engage.amherst.edu". Inside this box, there are two input fields: "Username" with the placeholder text "username" and "Password" with the placeholder text "password". A purple "SHOW" button is located to the right of the password field. Below the input fields is a green "Login" button. At the bottom of the login area, there are three links: "Forgot your password?", "Need to change your password?", and "Need Help?".

**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% participation out of 42% goal

Class of 2006 Statistics
\$759 out of \$65,000 goal
3% participation out of 40% goal

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.

Monty Mammoth '06 [View Profile](#)

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

Contact Information	
Email	Salutation
Phone Cell: Home: Work:	Mailing Address
+ 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.

The image shows a form for creating an email. At the top is a dark purple button with a white 'X' and the text 'Cancel'. Below this is the 'Email Template' section, which contains a dropdown menu with the text 'Select an Email Template' and a downward arrow. The 'Email Address' section is labeled 'Email Address *' and contains a text input field with the value 'Monty@mammoths.com'. The 'Subject' section is labeled 'Subject *' and contains an empty text input field. The 'Email Body' section is labeled 'Email Body *' and features a rich text editor. The editor's toolbar includes a back arrow, a forward arrow, a dropdown menu currently set to 'Paragraph', and icons for bold (B), underline (U), italic (I), link, image, bulleted list, numbered list, and a more options menu (three horizontal lines). The main text area of the editor is empty. At the bottom right of the editor, it displays '0 WORDS POWERED BY TINY' with a small icon. A dark purple 'Send' button is located at the bottom right of the form.

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.

The screenshot shows the Amherst College Volunteer portal interface. At the top, there is a purple header with the Amherst College logo and the word 'Volunteer'. Below the header is a navigation bar with links for Home, Assignments, Team, Recent Gifts, and Reports. The user is logged in as 'Hi, Ava | Logout'. The main content area shows the breadcrumb 'Assignments » Monty Mammoth » Create Contact'. The title is 'Create Contact with Monty Mammoth'. There is a 'Contact Type' dropdown menu with the placeholder text 'Select a contact type'. Below it is a large text area for 'Notes'. At the bottom right, there are 'Cancel' and 'Save' buttons.

Use the dropdown to select the most appropriate contact type:

This image shows a close-up of the 'Contact Type' dropdown menu. The menu is open, showing a list of options: 'Select a contact type', 'Call', 'Email', 'In Person', 'Remark', 'Social Media', and 'Text Message'. The first option, 'Select a contact type', is highlighted in blue.

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

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×

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.

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

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

The screenshot shows the top navigation bar of the Amherst College Volunteer portal. The 'Reports' dropdown menu is open, showing two options: 'Classmate Giving - Class of 2006' and 'Lybunt / Sybunt - Class of 2006'. The user is logged in as 'Hi, Ava'.

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

The screenshot displays the 'Classmate Giving - Class of 2006' report page. It includes a search bar, a 'Download Excel Report' button, and a data table with columns for Name, AF Solicitors, Donor Status AF, AF Ask Amount, AF Last Date of Gift, and AF giving amounts for 2024, 2023, and 2022. A 'Note' column is also present.

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).

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	-	