

Deerfield Academy Volunteer Management System Guide



www.deerfield.edu/vms

Overview

Welcome to Deerfield's Volunteer Management System!

The VMS is an efficient way for alumni volunteers to contact classmates and track outreach. This guide will help you sign up, select assignments, and get started.

Thank you for all your efforts! Go Big Green!

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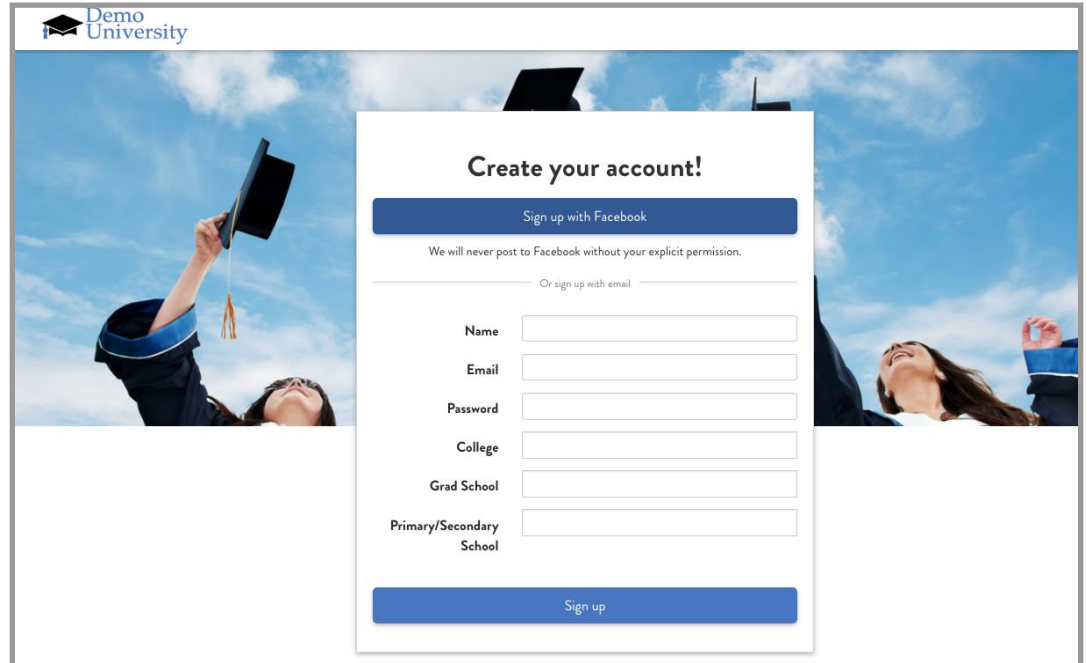
www.deerfield.edu/vms

Signing Up for a GiveCampus Account

- 1) Go to givecampus.com/schools/DeerfieldAcademy/signup
- 2) Create an account using the email that Deerfield Academy uses to send you emails. If you are unsure of the correct email associated with your account, email annualgiving@deerfield.edu

Pro tip: It is easiest to use your email to create your account, but you can link it to Facebook later.

- 3) Click on the confirmation link that was emailed to you to activate your account

A screenshot of a web form titled "Create your account!" for "Demo University". The form is overlaid on a background image of graduates in blue caps and gowns throwing their caps into the air against a blue sky. The form includes a "Sign up with Facebook" button at the top, followed by a disclaimer: "We will never post to Facebook without your explicit permission." Below this is a link "Or sign up with email". The form contains input fields for "Name", "Email", "Password", "College", "Grad School", and "Primary/Secondary School". At the bottom is a blue "Sign up" button.

Searching & Selecting Assignments

Once you've logged in, you're all ready to start selecting assignments! Head to the "Search Constituents" tab (on the left sidebar) to see all selectable constituents. Once you've selected an assignment, you'll be able to see more information about that individual.

☐ Use Advanced Search (Name, Major, Current Location, Activities, Class Year)

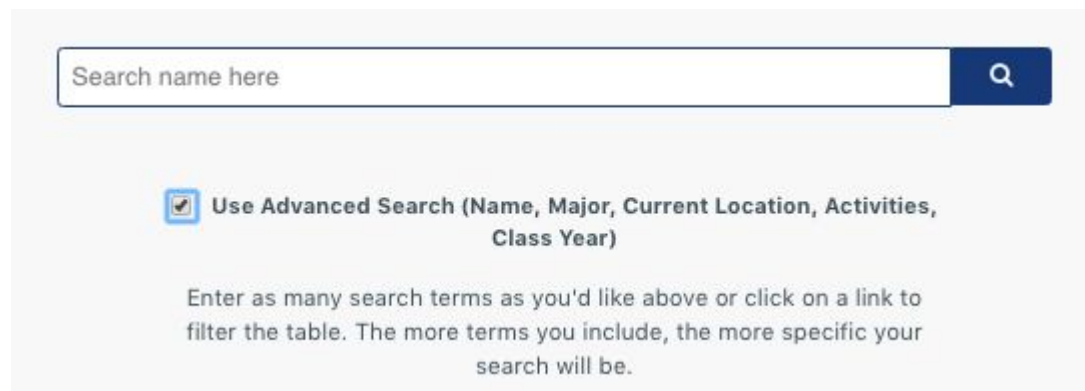
Enter as many search terms as you'd like above or click on a link to filter the table. The more terms you include, the more specific your search will be.


↕Name	↕Major	↑Current Location	↕Activities	↕Class Year	↕Status
Bauch, Armand	African Studies	Alexandramouth, OK	Volunteering	1980	Request Assignment
Auer, Bruce	French	Alexandrinemouth, CA		1980	Request Assignment
Anderson, Carson	Sociology	Auerberg, AZ		1980	Request Assignment
Auer, Candida	Computer Science	Bartberg, IN		1980	Request Assignment
Abbott, Xander	Biology	Bauchbury, OR	Athletics	1980	Request Assignment
Bauch, Sadye	Italian	Bayermouth, MT	Athletics	1980	Request Assignment

Searching & Selecting Assignments: Advanced Search

You are able to search by different categories. To easily find anyone by their name, enter the name in the search bar and press the magnifying glass.

If you'd like to search by other characteristics, e.g., “lybunt” status, check the box beside “Advanced Search” before clicking on the magnifying glass.




Search name here 

☒ Use Advanced Search (Name, Major, Current Location, Activities, Class Year)

Enter as many search terms as you'd like above or click on a link to filter the table. The more terms you include, the more specific your search will be.

Searching & Selecting Assignments

Once you've found a constituent with whom you'd like to pair, click on the "Select Assignment" button.



☐ Use Advanced Search (Name, Major, Current Location, Activities, Class Year)

Enter as many search terms as you'd like above or click on a link to filter the table. The more terms you include, the more specific your search will be.

#Name	#Major	#Current Location	#Activities	#Class Year	#Status
Anderson, Kade	Political Science	West Ronny, WI	Volunteering, Mentoring	2005	UNSELECTABLE
Anderson, Estefania	Arts	Lake Alannahaven, MN	Athletics, Mentoring	2005	Request Assignment
Anderson, Yazmin	Italian	West Cassidy, NH	Volunteering, Athletics	2005	ASSIGNED TO ME

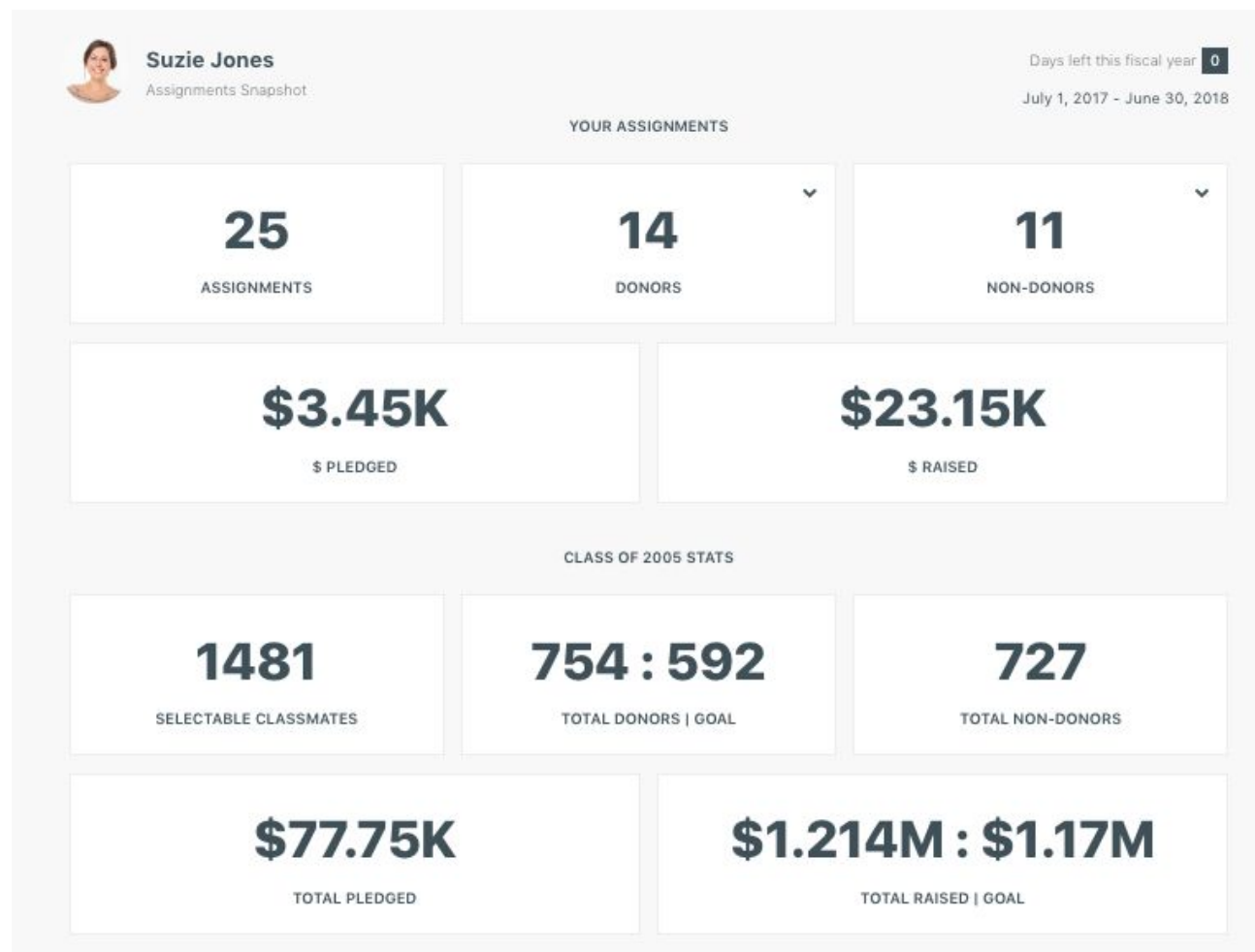
Searching & Selecting Assignments: FAQs

- **Why is a constituent marked as “Unselectable”?**
 - A constituent may be marked Unselectable for a variety of reasons, including that they have already been chosen by another Volunteer, they’re a current parent, or that they have requested to not be contacted/asked for a donation. Contact Deerfield Annual Fund staff if you have questions about a constituent who is marked as “Unselectable.”

Tracking Progress via “My Assignments”

Once you have selected your assignments, you will see them on the “My Assignments” page (top left sidebar).

Here, you can see statistics about your assignments and your class as a whole.



The “My Assignments” page - Assignment List

Scrolling down past the reporting tiles, you will see a full list of your assignments. You can use the filters to sort your assignment list by those who “Have Given”, etc.

The screenshot displays the 'My Assignments' page interface. At the top, there is a 'FILTERS' section with several buttons: 'ALL' (highlighted in blue), 'HAS GIVEN', 'HAS PLEDGED', 'HAS NOT GIVEN', 'NO CONTACT THIS FY', 'ASKED BUT NO GIFT', 'PLEDGED BUT NO GIFT', 'GAVE LESS THAN ASK', and 'BUT NO THANK YOU SENT'. An orange arrow points from the 'HAS GIVEN' button to a yellow callout box. The callout box contains the text 'Use these filters to sort your list!'. Below the filters, there is a table listing assignments. The table has four rows, each representing an assignment by a person's name. Each row includes the name, the status 'HAS GIVEN', the percentage of the suggested ask, a link to 'Go to full record', and a dropdown arrow.

Name	Status	Progress	Action
Amaya Ali	HAS GIVEN	100% of suggested ask	Go to full record ▼
Johan Allison	HAS GIVEN	50% of suggested ask	Go to full record ▼
Erin Bentley	HAS GIVEN	100% of suggested ask	Go to full record ▼
Presley Hartman			Go to full record ▼

The “My Assignments” page - Snapshot View

Clicking on the names of any of your assignments will open up their “Assignment Snapshot”. From this view you can see information about your most recent outreach efforts, plus some giving history.

Matt Example
Class of 2018
[Add Note](#) [Call](#)

Personal

Phone Number	Home: 111 111-1111 Cell: 111 111-1212
Location	Washington
Address	Washington, US
Email	matt@example.com

Employment

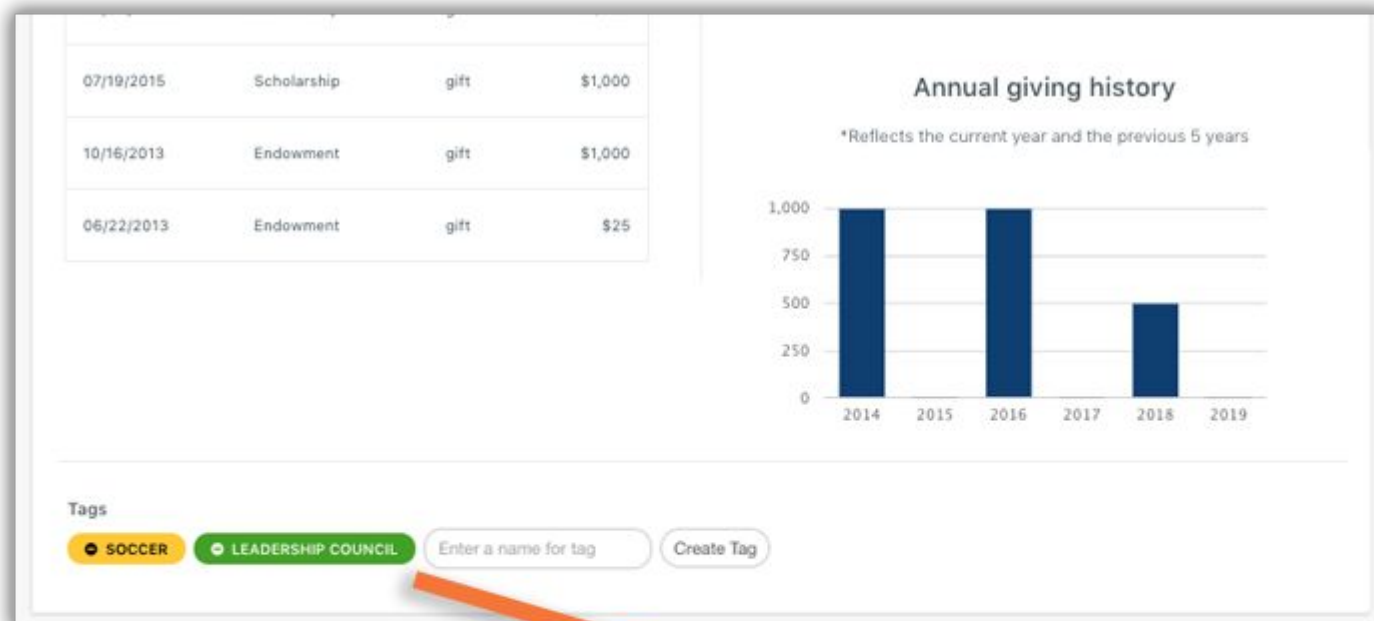
Employer	GiveCampus
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Giving History

Donor Status	LYBUNT
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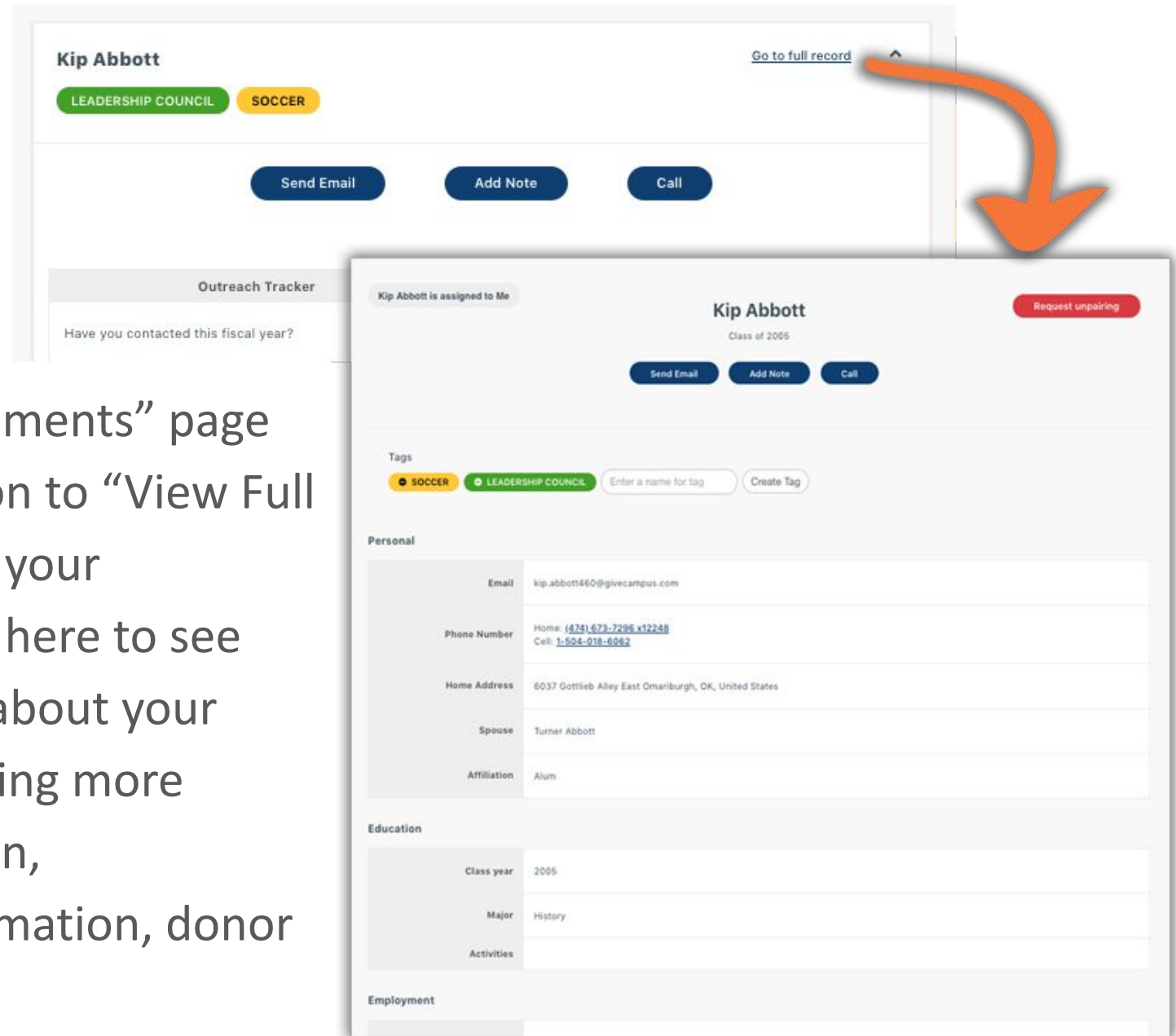
The “My Assignments” page - Tags

At the bottom of the “Snapshot” is an option to add a “Tag” to an assignment. You can use Tags to sort your Assignments list as well as the recipients list when sending out emails. Tags are a great way to create custom groups within your Assignments.



Pro Tip: You can use multiple filters at the same time, so you could select “Has Given” and “Soccer” to find everyone in your list who has a tag of Soccer and has given. Just click the filter again to remove it.

The “My Assignments” page to the Full Record



On the “My Assignments” page you have the option to “View Full Record” for any of your constituents. Click here to see additional details about your Assignment including more contact information, employment information, donor status.

Sending Emails

You can send emails in a few different ways:

1. From the Email page
2. From the My Assignments page or a constituent's Full Record using the "Send Email" button

My Assignments (15 / 75)

Reporting

Search Constituents

Notifications

Messages

Tasks

Notes

Email

My Templates

Resources

Tags

Christop Friesen

HAS GIVEN 50% of suggested ask

[Go to full record](#)

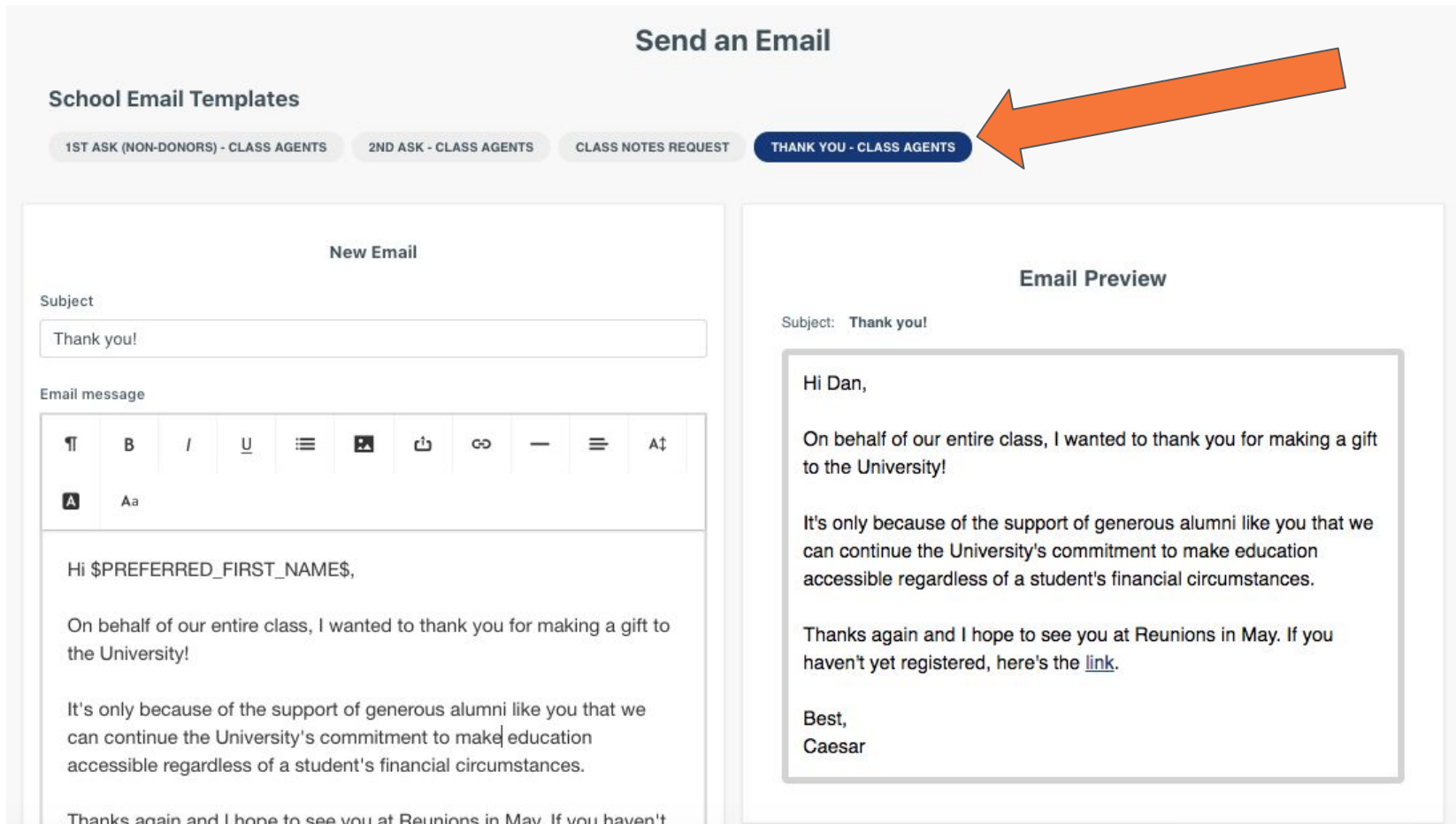
Send Email

Add Note

Call

Sending Emails: Email Page

- Click “Email” on the navigation bar
- Select a pre-made Email Template OR begin drafting your own email



The screenshot displays the 'Send an Email' interface. At the top, there's a header 'Send an Email'. Below it, a section titled 'School Email Templates' contains four buttons: '1ST ASK (NON-DONORS) - CLASS AGENTS', '2ND ASK - CLASS AGENTS', 'CLASS NOTES REQUEST', and 'THANK YOU - CLASS AGENTS'. An orange arrow points to the 'THANK YOU - CLASS AGENTS' button. Below the templates, the interface is split into two main sections: 'New Email' on the left and 'Email Preview' on the right. The 'New Email' section has a 'Subject' field with 'Thank you!' and an 'Email message' area with a rich text editor. The editor contains the following text: 'Hi \$PREFERRED_FIRST_NAME\$,', 'On behalf of our entire class, I wanted to thank you for making a gift to the University!', 'It's only because of the support of generous alumni like you that we can continue the University's commitment to make education accessible regardless of a student's financial circumstances.', and 'Thanks again and I hope to see you at Reunions in May. If you haven't'. The 'Email Preview' section shows the rendered version of the email, including the subject 'Subject: Thank you!' and the body text: 'Hi Dan,', 'On behalf of our entire class, I wanted to thank you for making a gift to the University!', 'It's only because of the support of generous alumni like you that we can continue the University's commitment to make education accessible regardless of a student's financial circumstances.', 'Thanks again and I hope to see you at Reunions in May. If you haven't yet registered, here's the [link](#).', 'Best,', and 'Caesar'.

Sending Emails: Email Page

- Preview how the message will appear for the recipient in the “Email Preview” box on the right side of the screen
- Select who you would like to receive this email using the “Select All” option or marking the checkbox beside their name
 - **Pro tip:** Use the “Filters” below the Recipients list to customize your recipient list to a subset of your assignments.
- Click “Send Email” and all of the recipients will receive their own email from you. Any replies will go directly to your personal email inbox at the address you use to login to the VMS.

The screenshot shows the 'Recipients' section of the GiveCampus interface. At the top right of the recipients list are links for 'Select all' and 'Deselect all'. The list contains four entries, each with a checkbox and a name followed by a status in asterisks: 'Katelin Crona *Has Given*', 'Christop Friesen *Has Given*', 'Ursula Mante *Has Given*', and 'Kamron Toy *Has Given*'. Below the list is a 'Filters' section with several buttons: 'ALL', 'HAS GIVEN' (which is highlighted in dark blue), 'HAS PLEDGED', 'HAS NOT GIVEN', 'NO CONTACT THIS FY', 'ASKED BUT NO GIFT', 'PLEDGED BUT NO GIFT', 'GAVE LESS THAN ASK', and 'GAVE BUT NO THANK YOU SENT'.

Sending Emails: Send Email Button

The “Send Email” button allows you to send an email to a single assignment from their My Assignments Snapshot page or their Full Record

- Click the “Send Email” button
- Select a pre-created email template or draft your own message
- Mark whether this is a Gift Conversation or Thank You (doing so will update the assignment’s outreach tracker)
- Click “Send Email.” If you’d like to receive a copy in your inbox, check the box beside “Send me a copy”

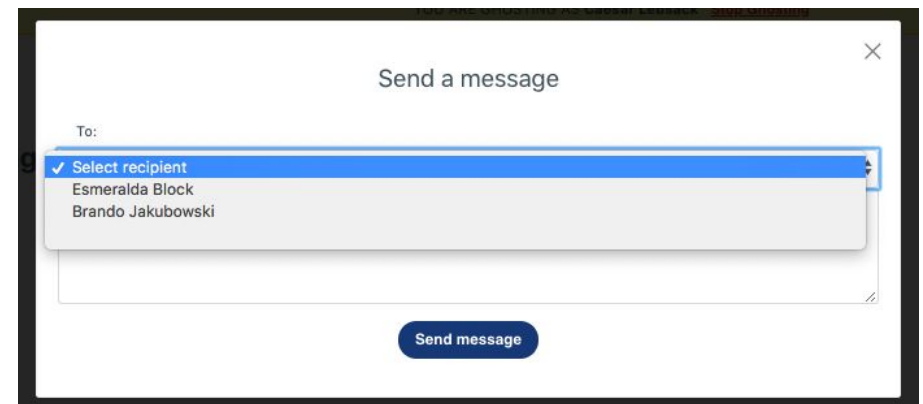
The image shows a two-part screenshot of the GiveCampus interface. The top part shows a user profile for 'Christop Friesen' with a 'Send Email' button. An orange arrow points from this button to the bottom part of the image, which shows the 'Send email to Christop Friesen' modal. This modal includes a 'Send Christop an email' title, a note about automatic note generation, 'School Email Templates' (1st Ask, 2nd Ask, Class Notes Request, Thank you), checkboxes for 'Is this a gift conversation?' and 'Is this to thank them for a gift?', a 'Subject' field, a 'Message' field with formatting tools, and a 'Send me a copy' checkbox. A 'Send Email' button is at the bottom right.

Messages

Through Messages you will be able to communicate with DA staff. All messages will be stored in the VMS for easy reference.

To access and send messages:

- Click on the “Messages” tab and then the “Send a Message” button
- Select the recipient to whom you’d like to send the message
- Enter your message and press “Send Message”



The screenshot shows a modal dialog box titled "Send a message" with a close button (X) in the top right corner. Below the title is a "To:" label followed by a dropdown menu. The dropdown menu is open, showing a blue header with a checkmark and the text "Select recipient". Below the header are two options: "Esmeralda Block" and "Brando Jakubowski". Below the dropdown menu is a text input field. At the bottom right of the dialog box is a blue button labeled "Send message".

Thank you so much for your hard work for Deerfield!

Please reach out to a member of the Annual Fund team with any questions:

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