

UVA Volunteers in Action User Instructions

www.uvavolunteers.org



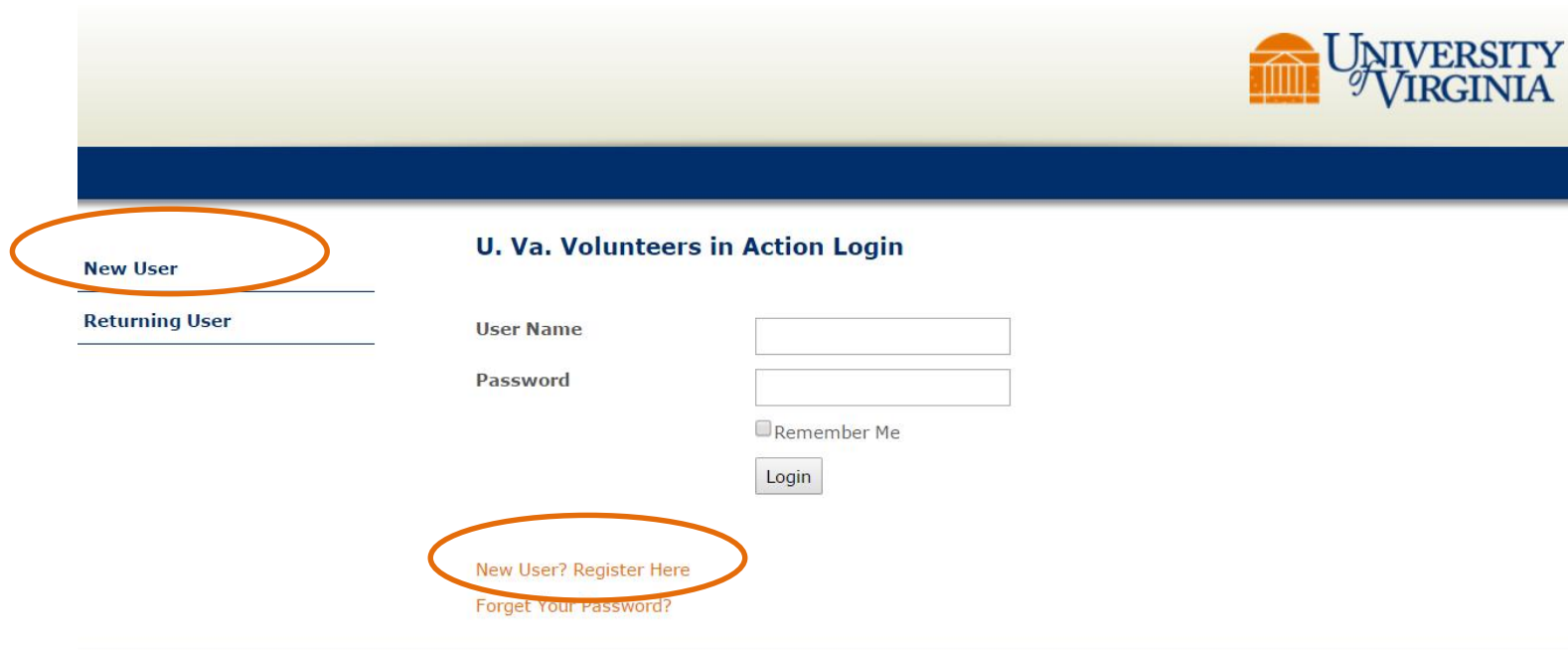


- VIA is a secure volunteer management system that will allow you to choose classmates to contact about Reunion Giving and Virginia Reunions.
- You will be able to customize provided templates and send emails directly through VIA.
- VIA will update nightly so that you will have the most up-to-date classmate information.
- You will have the ability to update the contact information of classmates.

User Account Set-up

Go to the VIA website: www.uvavolunteers.org

If you are a first time user, click on the New User link on the left or below the login box.



The screenshot shows the login interface for the University of Virginia Volunteers in Action. At the top right is the University of Virginia logo. On the left, there are two links: 'New User' (circled in orange) and 'Returning User'. The main title is 'U. Va. Volunteers in Action Login'. Below this are input fields for 'User Name' and 'Password'. There is a 'Remember Me' checkbox and a 'Login' button. At the bottom, there are two links: 'New User? Register Here' (circled in orange) and 'Forgot Your Password?'.

UNIVERSITY of VIRGINIA

New User

Returning User

U. Va. Volunteers in Action Login

User Name

Password

☐ Remember Me

Login

New User? Register Here

Forgot Your Password?

User Account Set-up

- To login into VIA for the first time, you will need to fill in your Last Name, First Name, and ID Number. Your ID Number will be provided to you by the Reunion Giving staff. Please note your ID Number will be ten-digits (ex. 0000123456)
- Once you fill in this information, click **Submit**. The system will then prompt you to accept a confidentiality agreement.
- Once you accept, you will be able to create your username and password and will automatically be logged into the system.

Create New Account: Step 1

Last Name

First Name

ID Number

My Account

REUNION GIVING
come back, give back!

Username and Password

Please Note: Usernames and passwords must be at least four characters long and can only contain letters and numbers. Spaces, punctuation marks and other special characters are not supported.

Home

My Account

Volunteer Portal

- Request Classmates

- My Assignments

- My Fundraising Progress

- New Gifts

- Class Progress

- Resources

- Email Classmates

Username

givingtest

New Password

Personal Password Hint

What is your pet's name? ▼

Email Address

nbriggspci@gmail.com

☐ Send me a confirmation email , so I have a record of my username in the future.

Submit Clear

Confirm Password

Personal Password Answer

clifford

Email Type

Business ▼

Click on **My Account** on the left side navigation bar to change your username and password. Simply fill out the form, and then click **Submit**.

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Volunteer Portal



Welcome Reunion Committee!

Thank you for volunteering to serve on your Reunion Committee! We are excited to welcome you to the committee and appreciate your passion and commitment to the University of Virginia!

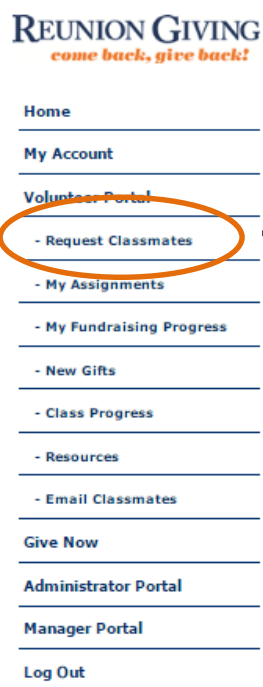
The purpose of this volunteer management system, UVA Volunteers in Action (VIA), is to provide you with the most updated and accurate information so that you feel comfortable and confident to solicit classmates for a gift and educate them about Reunions Weekend. The information in VIA will be updated nightly, and you can access it at any time.

We look forward to working with you over the next several months and celebrating at Reunions Weekend. Thank you and Wahoowa!

- Reunion Giving Team

The **Volunteer Portal** allows you to easily interact with your classmates, track your progress, classmate giving history, and download reference materials.

Request Classmates



Class Roster

Campaign: Reunion Giving (2X7) ▼
Class: 1977 (RG) (2198 Active Prospects) ▼
Last Name Starting With: All ▼

Show 10 entries Search:

#	Name	Maiden Name	Location	Volunteer	Top Prospect	UG School	Status	Pair
1	Diane Abbott		New York, New York	No		Arts & Sciences	Not paired	<input type="checkbox"/>
2	James Adams		Warrenton, Virginia	No		Arts & Sciences	Not paired	<input type="checkbox"/>
3	John Adams		Gainesville, Florida	No		Arts & Sciences	Not paired	<input type="checkbox"/>
4	Pamela Umphlett Adams	Umphlett	Charlottesville, Virginia	No		Arts & Sciences	Not paired	<input type="checkbox"/>
5	Steve Adams		Fairfax Station, Virginia	No		Engineering	Not paired	<input type="checkbox"/>
6	Susan Adams		Washington, District of Columbia	No		Arts & Sciences	Not paired	<input type="checkbox"/>
7	William Adams		Arlington, Virginia	No		Arts & Sciences	Not paired	<input type="checkbox"/>
8	Melissa Potter Adde	Potter	1180 Brussels	No		School of Nursing	Not paired	<input type="checkbox"/>
9	Christie Aderholt		Charlottesville, Virginia	No		School of Nursing	Not paired	<input type="checkbox"/>
10	Jim Agnew		Goochland, Virginia	Yes		Arts & Sciences	Not paired	<input type="checkbox"/>

Showing 1 to 10 of 2,198 entries

First Previous 1 2 3 4 5 Next Last

1. Click on the **Request Classmates** link under the Volunteer Portal on the left navigation.

2. Click on the checkbox next to the classmate you would like to be paired with. This list will show everyone in your class. You can sort the list by clicking on the column headers, or navigate through the list by scrolling through the page numbers. If a classmate has already been selected, the checkbox for that classmate will be disabled.

3. Once you have selected the classmates you would like to pair with, click **Update** at the bottom of the page. You will then automatically be paired with those classmates.

Search for Classmates

Search for Classmates

First Name	<input type="text"/>
Nickname	<input type="text"/>
Maiden Name	<input type="text"/>
Last Name	<input type="text"/>
City	<input type="text"/>
State	--Any--
School	--Select-- Architecture Arts & Sciences Batten School
Previous Year Donor?	<input type="checkbox"/>
Top Prospect?	<input type="checkbox"/>
Residence	--Select-- Abbott Dorm Balz Dorm Balz-Dobie Dorm
Student Activities	--Select-- 13 Society 26 East Society 3-2-2 Ath. Advisory Council
Sports	--Select-- Cheerleading Diving Gym Group
Awards and Honors	--Select-- A. L. Bennett Scholarship AA Distinguished Service Award AA Distinguished Student Award
Activity Keyword Search	<input type="text"/>
<input type="button" value="Search"/>	

You can also search for classmates by name, geographic locations and student groups and affiliations. Hold down the CTRL key to select multiple options in the selection lists. Execute the search by clicking on the **Search** button at the bottom. Once your search is complete, you can select the classmates by checking the **Pair** checkbox and then the **Update** button to add the classmates to your assignments.

My Assignments

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Home
My Account
Volunteer Portal
- Request Classmates
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- My Fundraising Pro
- New Gifts
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- Email Classmates
Give Now
Administrator Portal
Manager Portal
Log Out

Reunion Campaign

Reunion Giving (4x9) ▼

Class

2009 (RG) (3610 Active Prospects) ▼

No.	Name ▲	Status	Remove
1	Alisa Abbott	To be contacted	Remove
2	Chinyelu Agbim	To be contacted	Remove
3	Mariam Ahmad	Completed	Remove
4	Samin Ahmad	To be contacted	Remove
5	Jeff Allen	Completed	Remove
6	Jordan Allen	In progress	Remove

To be contacted - The alumnus/a has not been contacted through the VIA system and has not made a gift.

In progress - The alumnus/a has been contacted through the VIA system, but has not made a gift.

Completed - The alumnus/a has made a gift.

Once you have selected the classmates you would like to reach out to, click on the **My Assignments** link located on the left hand navigation bar under Volunteer Portal. To start the contact process, click on the name of the person you would like to contact. If you would like to remove a classmate from your list, click on the **Remove** link to the right of the person's name.

Overview: Contacting Your Classmates

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Contact history

Contact assignment

Update contact info

Add/View comments

Giving history

Contact John Sample

INSTRUCTIONS

Campaign

Reunion Giving (0x5)

Status

To be contacted

Contact Method

This alumna/us has a solicitation restriction. ▼

Template

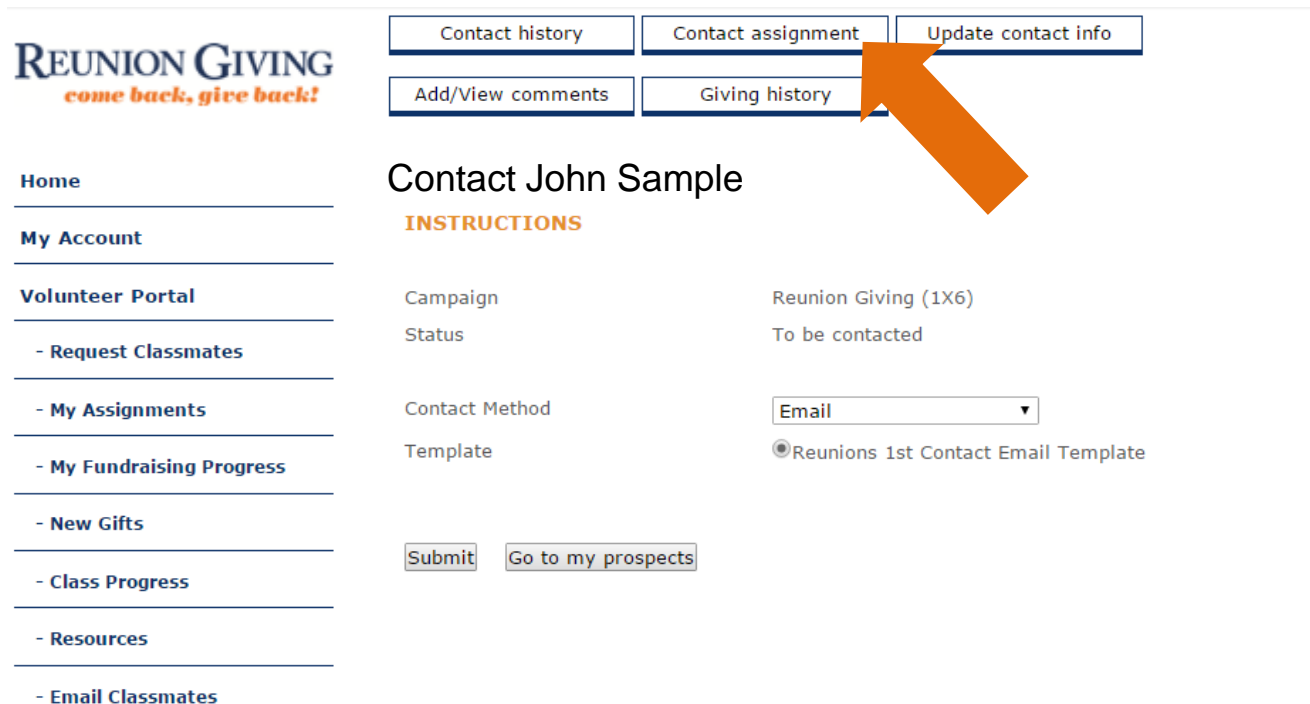
Submit

Go to my prospects

The navigation boxes at the top of the screen will allow you to:

- Contact your classmate via email, phone, or letter (Contact assignment).
- View your contact history with the classmate (Contact history).
- Add or view any comments you made regarding this classmate (Add/view comments).
- View the number of years the classmate has given to the University and the donor societies they belong to, if applicable (Giving history)
- Update home and business contact information for the classmate (Update contact info).

Contact Assignments



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Contact history Contact assignment Update contact info

Add/View comments Giving history

Contact John Sample

INSTRUCTIONS

Campaign: Reunion Giving (1X6)
Status: To be contacted

Contact Method: Email
Template: ☒ Reunions 1st Contact Email Template

- Click **Contact Assignment** to contact your classmate by email, phone, or written correspondence. Templates for each communication type will auto populate with text, including name of your classmate, and the appropriate contact information. You may personalize each template before sending.
- To start making contact, select the contact method you want to use. A series of radio buttons will display the available templates for that contact type. Select the template and then click on **Submit**.

Email Multiple Classmates

The screenshot displays the Reunion Giving website interface. On the left is a navigation menu with the following items: Home, My Account, Volunteer Portal, - Request Classmates, - My Assignments, - My Fundraising Progress, - New Gifts, - Class Progress, - Resources, and - Email Classmates. The 'Email Classmates' item is circled in orange and labeled with a large '1.'. The main content area shows a four-step process: Step 1: Pick a campaign (Campaign: Reunion Giving (1X6)), Step 2: Pick a Datagroup (Datagroup: 1981 (RG)), Step 3: Pick a template (Template: 1981 RG Thank You Template for Gifts, circled in orange and labeled with a large '2.'), and Step 4: Pick Your Prospects (Recipients: Reunion Giving (1X6), 1981 (RG), and a list of Classmate 1 through Classmate 4, with the list circled in orange and labeled with a large '3.').

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Step 1: Pick a campaign

Campaign: Reunion Giving (1X6)

Step 2: Pick a Datagroup

Datagroup: 1981 (RG)

Step 3: Pick a template

Contact Method: Email

Template: 1981 RG Thank You Template for Gifts

Step 4: Pick Your Prospects

Recipients:

- Reunion Giving (1X6)
- 1981 (RG)
- Classmate 1
- Classmate 2
- Classmate 3
- Classmate 4

In addition to contacting your classmates individually through **Contact Assignment**, you can use **Email Classmates** to email multiple classmates at one time.

1. Click on **Email Classmates** in the left navigation. Your campaign and data group will already be correctly filtered for your class.
2. **Pick a template.** A solicitation email and a thank you email template will be available in the drop down box. By selecting a template, you will automatically filter your assignments by nondonors (solicitation template) and donors (thank you template).
3. **Pick your prospects.** You can select all or target a specific group within your assignments.
 - The email template will populate below the assignment list. You can edit the text, but keep in mind that everyone you select from your assignment list will receive the same text. First names will be personalized for each individual.

Contact History

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Contact History for John Sample

INSTRUCTIONS

[Add Pledge](#)

History						
Date ▾	Method	Description	Recorded By		Record Result	Result
9/2/2014 18:12 PM CST	Phone	Phone Template	Giving Test record	Delete	Record Result	No answer/busy number
9/2/2014 18:12 PM CST	Phone	Phone Template	Giving Test record	Delete	Record Result	Phone call complete

Volunteer Contact Complete

-- Select a status -- ▾

[Update](#) [Go to my assignments](#)

Click on **Contact history** to view your communication with your classmate. This will help you keep track of what type of contact has been made and the result of that contact.

Update Contact Information

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Contact history

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Add/View comments

Giving history

Personal and Business Information

Prospect Name: John Sample

Home Address:	123 Rotunda Ln Charlottesville, VA 22904	Business Address:	
Home Telephone:		Title:	
Home Cell:	434-123-4567	Business Telephone:	
E-mail Address:	johnsample@virginia.edu	Company Name:	
		Business E-mail	

Edit

Edit

You can view and update your classmate's personal and business contact information by clicking on **Update contact info** in the top navigation bar. To update contact information, click on the **Edit** button underneath the appropriate contact information type.

Add/View Comments

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Write notes/comments about John Sample

INSTRUCTIONS

Submit

Comment History

Date	Posted By	Reunion Campaign	Message	Action
9/2/2014	Giving Test record	Reunion Giving (4x9)	Will call back next week...	Delete

Go to my assignments

Click on **Add/View comments** to write notes about your classmate in the available box. To store the information, click **Submit**. Please note that these comments will also be available for the Reunion Giving staff to view.

Giving History

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[Giving history](#)



Recent Giving History for John Sample

INSTRUCTIONS

Fiscal Year	Gift Type
2012	Gift
2010	Pledge Paid
2009	Pledge Paid

[Go to my assignments](#)

Under **Giving History** you will be able to view the number of years your classmate has given back to the University. Please note that actual dollar amounts will not be available in the system. You will want to reference this page each time you reach out to your classmate.

Where to Find New Gifts



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New Gifts/Pledges

INSTRUCTIONS

Please send an acknowledgment to these donors by clicking on the donor's name.

Name ^

Gift Type

1 Thomas Jefferson Gift



To see if any of the classmates you claimed have made a gift, click on **New Gifts** located on the left side navigation bar. Click on the donor's name to go into their record to send a thank you email.

Helpful Links

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Welcome Reunion Committee!

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We look forward to working with you over the next several months and celebrating at Reunions Weekend. Thank you and Wahooo!

- Reunion Giving Team

- **My Fundraising Progress** will allow you to see the percentage of classmates you contacted and the percentage who made a gift.
- Click on **Class Progress** to find the most up-to-date information on the progress of your class' fundraising goals.
- To find helpful volunteer information, click on **Resources**.
- **Lodging** will give you information about on Grounds housing and local hotel blocks for Reunions Weekend.
- **Give Now** will take you directly to the online reunion giving form.
- **Planning to Attend** will give you quick access the planning to attend form.
- Click **Log Out** to end your VIA session.