Copy and paste this content directly into your resources!

Getting Started with the Volunteer Management System in 4 Easy Steps

✅ Step 1: Select Your Assignments

- Head to the 'Search Constituents' tab
- Find folks you'd like to engage throughout the year
- Click 'Assign to me' or 'Request Assignment' to the right of each constituent!

Want more information about selecting assignments? Check out our FAQs about getting started below.

👀 Step 2: Review Assignment Giving History and Information

- Head to the 'My Assignments' tab
- Click an assignment's name to jump into a snapshot of your assignments' giving history. This will show you their giving for the last 5 years, recent gifts, etc.
- Click 'Go to Full Record' to see additional information about each of your assignments, employment and contact information, etc.

Pro-Tip: Do we have incorrect contact information on one of your assignments? Click "Add note" to provide updated contact information!

📩 Step 3: Emailing Assignments

We will provide different email templates for you to send to your assignments throughout the course of the year!

There are two ways you can email your assignments

- **Emailing a Single Assignment**
    - Within the Giving Snapshot or the 'Full Record' view, click the 'Email' button.
    - This will allow you to send an email to that single assignment using one of the templates provided, or by writing your own!
- **Emailing Multiple / All Assignments**
    - Click on the 'Email' tab on the left hand side of your volunteer dashboard. You'll see email templates available here as well.
    - Select the template you'd like to send and add some personal touches.
    - Select the assignments you'd like to send this email to.
        - You can select all, hand pick a few assignments to email, or use the filters to, for example, only email assignments who have not given yet this year.
    - Send email!

📃Step 4: Check out Resources!

- Click the ‘Resources’ tab on the left hand side of your volunteer dashboard.
- Here you’ll see additional information about using the Volunteer Management System, other information about fundraising and events, etc.
- We’ll add new resources to the system throughout the year, so if you even have questions about your volunteer work or what’s happening around campus, this is a great place to start!

❓Getting Started FAQs

- **What is an assignment?**
  Your assignments are the folks you’ll be responsible for engaging during your time as a volunteer. They could be friends, acquaintances, classmates, roommates, etc.

  Fun Fact: Did you know that members of our community are 44% more likely to give when they hear from a volunteer? Your assignments don’t need to be people that you know super well – it’s more important than people hear from a volunteer at all!

- **I requested an assignment, but I don’t see them on the ‘My Assignments’ tab?**
  Depending on what type of volunteer you are, these assignments may need to be reviewed and approved or they may become assigned to you automatically!

- **One of my classmates is listed as ‘Unselectable’ – what does that mean?**
  A constituent could be unselectable for any number of reasons – they might not want to be contacted at all, they might be in close conversations with a member of our team, or they might already be assigned to another volunteer.

  If you think you’d still be a great person to engage this person, let us know! We can manually assign you on the back end.

- **Why don’t I see an email button for one of my assignments?**
  This means that we don’t have an active email on file for this person, so there’s no way to email them!

  If you know their email, you can provide that to us by clicking ‘Add Note’ for that assignment, and providing that updated contact information.