Online Tool Guide

I. Welcome and Overview

The Online Tool is a web portal that was designed to make your work as a volunteer fundraiser easier and more efficient. It allows you to view the contact information and giving history of your assignments in one secure online location, and it makes the collaboration between volunteers and Bates more productive.

All contacts with your assigned classmates should be recorded in the tool and will be shared with Bates within 24 hours. You will also be able to see in real-time when a gift is made, allowing you to send prompt thank you notes and emails.

Volunteers are integral to the college's success, and we truly appreciate your involvement. Thank you!

II. Functions of the Online Tool

The Online Tool supports three essential functions:

- **Displays Information.** The tool shows information about your classmate assignments. If the information is available in the Bates database, the interface displays:
  - Contact information (phone, email etc.)
  - Employment information
  - Family information (spouse, children etc.)
  - Confidential Bates giving information

- **Tracks Contact Status.** The online tool allows you to track your contacts with classmates, and it will display whether a person has made a gift or pledge.

- **Contact Results.** The online tool allows you to enter the results of your contacts and pass this information seamlessly to the Bates database.

III. How to Log In

1. Visit www.bates.edu/g (Bates Garnet Gateway)
2. Sign in using your user ID and PIN (if you are a first time online tool user, this information will be sent to you by your Bates Staff Liaison). If you have used the Online Tool before, but don't recall your PIN, click "Forgot my PIN" on the log in screen, or call the Bates College Help Desk at 207-786-8222 during business hours, M-F, 8-4:30. Advancement staff do not have the ability to assist you with your PIN.
3. Once logged in, you will see a screen with multiple tabs across the top. Choose the "Volunteer" tab.
4. Click "Fundraising Volunteer."
5. You will be asked to read and "sign" a confidentiality agreement. This is an annual requirement for all volunteers. Read the agreement thoroughly, enter your PIN, and choose "Accept."

IV. Explanation of Tabs and Columns

- Tab: There is now one tab (this is a new feature). The **Call List** tab displays all of your assignments, regardless of whether or not you've already contacted them and whether or not they have made a gift.

- Columns: There are six columns located on all tabs. Please review these columns and become familiar with the information.

  1. **Status:** This column displays what kind of contact (if any) you have had with your classmates.
  2. **Name:** This is your classmate's name. When you ready to contact this classmates, clicking their name brings you to their profile page.
  3. **Contact Info:** This column includes phone number and email address information. If Bates has an email on file, the email address will display here. If Bates does not have an email on file, "request email" is displayed. Please ask the classmate to update this information with you.
  4. **Bates Fund:** This column displays the different Bates Fund "programs" in which a classmate falls depending on ask amount, class year or alumni/parent affiliation. Please review the explanations below.
     - Bates Fund: Includes alumni with an ask amount of $1,854 and less.
     - Mount David Society Prospect: Includes alumni or parents with an ask amount of $1,855 and above who did not give at the MDS level last year.
     - Mount David Society: Includes any alumni or parent with ask amount of $1,855 and above who gave at the MDS level last year.
     - Class of XXXX: Includes any Reunion 2016 class (all classes ending in a 1 or a 6)
     - Parents Fund: Includes any parent with an ask amount of $1,854 and less.
  5. **Ask:** The amount listed is the "ask amount."
  6. **Class:** Displays the class year.

- Profile Page: By Clicking in the "Name" column, you will be brought to a classmate's profile page that shows additional contact information, contact notes, and allows you to create a new contact record. Reviewing this information (number of children, last gift amount etc.) will prepare you for the contact.

V. Steps to Complete a Contact

1. Click the name of the classmate you wish to contact
2. Review the personal information to prepare for the call
3. If any contact information is listed as "not on file," remember to ask the prospect to update this information with you.
4. Once the call is complete, enter the Contact Type, Contact Result, Pledge Amount (if pledge was confirmed) and contact notes.
5. Review all the information you have entered. In the contact notes (required field), enter any updates you received (new home, recently retired, new email address, new job, etc.) If any Bates staff member follow up is required, please note that here, and click "Flag for Bates staff follow-up." Click Submit.
6. This will bring you to an email form, which is populated with sample text. Please personalize the email, or send an email from your personal email account instead (click "skip email").