

Using the Online Tool

Logging In

- Visit www.bates.edu/g (Bates Garnet Gateway)
- 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 Registrar at 207-755-5949 during business hours, M–F, 8–4:30.
- Once logged in, you will see a screen with multiple tabs across the top. Choose the "Volunteer" tab. Click "Fundraising Volunteer."
- 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."

Tabs and Columns

- **Tab:** 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. 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 classmate, click their name to display 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 \$2,499 and less.
 - **Mount David Society Prospect:** Includes alumni or parents with an ask amount of \$2,500 and above who did not give at the MDS level last year.
 - **Mount David Society:** Includes any alumni or parent with an ask amount of \$2,500 and above who gave at the MDS level last year.
 - **Class of XXXX:** Includes any Reunion 2018 class (all classes ending in a 3 or an 8)
 - **Parents Fund:** Includes any parent with an ask amount of \$2,499 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.

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," remind the classmate to update this information.
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 populated with sample text. Please personalize the email, or send an email from your personal email account instead (click "skip email").