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.
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.
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**.
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, U.Va. 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 June 9 – 12! 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.
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

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

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.

<table>
<thead>
<tr>
<th>No.</th>
<th>Name</th>
<th>Status</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Alisa Abbott</td>
<td>To be contacted</td>
<td>Remove</td>
</tr>
<tr>
<td>2</td>
<td>Chinyelu Agbim</td>
<td>To be contacted</td>
<td>Remove</td>
</tr>
<tr>
<td>3</td>
<td>Mariam Ahmad</td>
<td>Completed</td>
<td>Remove</td>
</tr>
<tr>
<td>4</td>
<td>Samin Ahmad</td>
<td>To be contacted</td>
<td>Remove</td>
</tr>
<tr>
<td>5</td>
<td>Jeff Allen</td>
<td>Completed</td>
<td>Remove</td>
</tr>
<tr>
<td>6</td>
<td>Jordan Allen</td>
<td>In progress</td>
<td>Remove</td>
</tr>
</tbody>
</table>
Overview: Contacting Your Classmates

Contact John Sample

INSTRUCTIONS

- Campaign: Reunion Giving (0x5)
- Status: To be contacted
- Contact Method: This alumna/us has a solicitation restriction.
- Template

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

- 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

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.
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.
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.
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.
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

New Gifts/Pledges

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

<table>
<thead>
<tr>
<th>Name</th>
<th>Gift Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thomas Jefferson</td>
<td>Gift</td>
</tr>
</tbody>
</table>

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

- **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**.
- To view the Reunions 2015 Brochure of events, click on **Reunions 2015 Brochure**.
- **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.