

# Getting Started

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Log into your personal online portal. Your URL is unique to YOU.

Enter your EMAIL (the email you use with the Jewish Federation).

# Screen 1: Welcome Tab

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1. Contact Method: Match check boxes to screen below. Check all boxes for Contact Method.

2. Contact List: Select “I’m a Campaigner” then click **NEXT**.

## Welcome!

————— Contact method —————

Call

Text

Email

————— Contact list —————

I am willing to contact anyone

I’m a Campaigner, I prefer to call my assignments

**NEXT**

[Click here for help](#)

## Screen 2: Assignments Tab

- Select the first name under **OPEN**.
- All '**ASK**' amounts are set to **15% increase over** the donor's prior gift.  
(Note: Prior gift can be last year's gift or last gift made if we're trying to recover a gift).

# Screen 3: Your Solicitations Tab

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- You will find your donor's contact information and recent giving on this screen.
- After your conversation. Select "Tell us how it went" to submit a pledge, decline, contact later (Screenshot "Enter Results" below).

## Welcome!

Contact method

Call

Text

Email

Contact list

I am willing to contact anyone

I'm a Campaigner, I prefer to call my assignments

[NEXT](#)

[Click here for help](#)

## Screen 3: Your Solicitations Tab

Next, you will be prompted to a second screen. Select the appropriate choice for each option. Click **'NEXT.'**

3. After engagement with every prospective donor (call, email, text) you will be asked to record:

- Pledge amount
- Contact method
- Confirm whether contact was made or follow up is necessary
- Provide comments
- Provide demographic updates

4. **IMPORTANT:** Once logged in, no need to log out. Hit **"submit"** and move onto your next prospective donor.

5. To ensure the best donor experience for you and your donor, refer to the **Contact History** on your **Donor's Profile** (found on the **Assignments Page**) before making your next call. The **Contact History** is where your notes and all points of contact are recorded (each time you reach out).

# Commonly Asked Questions

- **Is there a match?** *We will give you an update via email in the coming weeks.*
- **The donor wants to pledge and pay. Can I take the payment?**  
Direct the donor to the website: [jewishportland.org/give](http://jewishportland.org/give); Or call the professional team at 503-245-6219.
- **I did not get an immediate response to a phone call. What should I do?** Add any pertinent comments in the 'comments section' i.e., call back Monday.
- **Where do I record gift amounts if I receive a response? It depends on the response:**  
**Pledges:** All gifts should be entered in the 'pledge amount' section.

# Commonly Asked Questions

**Refusals:** All refusals must be entered in two locations. Enter as a 'Decline' and in the 'comment section' stating 'refusal.'

- **Where do I record updates to contact information or billing information on a gift?**  
All updates should be entered in the 'comments section' these include conversation notes, billing notes, needs assistance, bad phone or address.
- **The donor asked to be sent a card in the mail. How do I record this?** Request to mail card in the 'comments section' and add a note to "send a pledge card."