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Introduction

The Mule Volunteer Portal (MVP) is an online volunteer tool that was created with Colby Fund volunteers in mind. MVP contains the information that has traditionally been printed on volunteer call sheets. MVP is updated daily, eliminating the need for printing call sheets, and allows you to make calls when it is convenient for you, from any place you have access to a Web browser and telephone.

MVP also provides a streamlined management tool for Head Agents, Reunion and Anniversary Chairs. There are several different "views" and your level of access is determined by your log in and your specific role as a volunteer.

Getting Started

To establish your account, go to www.colby.edu/mvp/setup.cfm. To verify your identity and to establish the security of your log in, you will be prompted to answer a few questions to before creating your password. In the future, should you forgot your password you will be asked to answer the security questions again to reset your password.

Step 1: Confidentiality Statement  (you will only have to go through this process once)

As a volunteer, you have access to personal information about your classmates. Please read the confidentiality statement before establishing your account.

MVP Account Set-Up

You receive your username from the Colby Fund Office.

If you do not know your username, please contact the Colby Fund Office at 800-311-3678.

After reading the confidentiality statement, click on the box and then on "Continue". 
**Step 2: Establishing your Security Question**

Using the drop down box, choose a question that you would like for your “security” question. You will be asked to answer this question if you forget your password at a later date. Enter the answer in the box below the question and click on “Continue”.

You can choose your own security question. You will only need to answer the security question if you forget your password.
Step 3: Create your password

Enter your password (must be at least 6 characters and contain at least one number). **Passwords are case sensitive.** Once done, click on “Finish”.

The following screen should appear. Click on “Proceed to login page” where you can log in for the first time.
Logging In (after you set up your account)

After your initial account set-up, you will access MVP by visiting www.colby.edu/mvp. You can add this link to your favorites for easy access. The following screen will appear.

Enter your username, password and click on “Login”.

[Image of login screen with entered username and password]
Welcome Page (Same for all volunteers)
This page will appear each time you log in to MVP. From here you can review your class progress, access calling scripts and MVP user guide, review your assignments, contact your Colby staff member, and make your own gift.

Confirms your log in and volunteer status.
Quick Links provide access to information commonly requested by volunteers. They also provide a printable version of your call sheets. See below for more detailed information.

Quick Links

- Instructions (Help)
- Contact Colby AG Staff
- Class Giving Statistics
- Scripts
- Make a Gift

**Quick Links**

*Instructions (Help)* provides basic instruction on use of MVP.

*Contact Colby AG Staff* takes you to the Annual Giving Staff page. You can click on the staff contact for your class and send an e-mail directly to the AG Staffer assigned to your class.

*Class Giving Statistics* provides a snapshot of giving for all classes. Numbers are updated daily.

*Scripts*

A number of sample calling scripts are maintained here.

*Make a gift* takes you directly to the Colby Fund gift screen and can be used to take credit card information from your assignments, without having to go through your AG staff person. The credit card gift is automatically processed through our secure payment gateway and is authorized in real time.

It is also an easy way for you to make your own gift. Our goal each year to have 100% participation from our volunteers.
Messages from Annual Giving and Class Specific Messages

Message from the Colby Fund staff. This message appears on the “Welcome” page of all volunteers.

Messages that appear in this area are managed by the Annual Giving Staff, but are from your head agent, reunion or anniversary chair and appear only on the “Welcome” page of volunteers in a particular class.
The following sections are updated daily and allow you to track progress toward class goals and the overall status of the Colby Fund.
My Assignments

Clicking on “My Assignments” will allow you to view information on those classmates or individuals whom you selected during the classmate selection process.
The following screen appears upon clicking “My Assignments”.

## Class Assignments Summary

You're logged in as: [Name]

**Shows current year status of giving.** (See below A for description of options here.)

This updated based on the results volunteers and student callers report back to Colby or gifts that are received.

<table>
<thead>
<tr>
<th>Class Member</th>
<th>Agent/Year</th>
<th>Fy2007 Status</th>
<th>Pledge Balance</th>
<th>Cash In</th>
<th>Pledge Gift Date</th>
<th>Fy2007 Ask Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Margaret Applewood '83</td>
<td>Agent-Year</td>
<td>pledge</td>
<td>$2,000</td>
<td>$0</td>
<td>8/1/08</td>
<td>$0</td>
</tr>
<tr>
<td>James A. Baird '83</td>
<td>Agent-Year</td>
<td>pledge</td>
<td>$1,000</td>
<td>$0</td>
<td>8/1/08</td>
<td>$0</td>
</tr>
<tr>
<td>Eleanor Williams Green '83</td>
<td>Agent-Year</td>
<td>pledge</td>
<td>$1,500</td>
<td>$0</td>
<td>8/1/08</td>
<td>$0</td>
</tr>
<tr>
<td>David P. White '83</td>
<td>Agent-Year</td>
<td>pledge</td>
<td>$400</td>
<td>$0</td>
<td>8/1/08</td>
<td>$0</td>
</tr>
</tbody>
</table>

Colby College Annual Giving Office
4320 Mayflower Hill • Waterloo, KE • 54901-8943
207-955-4320 • annualgiving@colby.edu

## A. Status

**Gift**: Appears when the individual has made a gift either by check, credit card, stock or other currency.

**Pledge**: Indicates that the individual has made a specific dollar amount commitment to the Colby Fund via phonathon, online giving, or other appeal.

**Unspecified Pledge**: Appears when an individual has committed to make a gift, but did not indicate a specific amount.

**Undecided**: Indicates that the individual is undecided about whether he/she will give this year.

**Refused phone call**: Indicates that when contacted via student phonathon the individual hung up or did not respond to the call.

**Pledge Refused Fiscal Year**: Indicates that the individual was contacted via phonathon and refused to donate this year.

**June Will Mail**: Appears in the final month of the fiscal year if the individual was contacted and said that he/she would send a check before the end of the fiscal year.

**“Giving through Third Party”**: Indicates that the individual will be donating through a foundation or other outside source.
Clicking on a name brings you to the detail page of your assigned classmate.

The tables that appear in MVP can be sorted in a number of ways by clicking on the underlined column headers. You can sort either ascending or descending – click once and it will sort one way, click again and it will sort the other. NOTE: You can only sort one field at a time.
### Classmate Detail (for all volunteers)

**Classmate Detail as of August 29, 2007**

You're logged in as:
Susan Lavena Morton (class of 1983)
Alumni Fund Anniversary Gift Committee
Chair
1983

#### Quick Links
- Instructions (Help)
- Contact Colby As Staff
- Class Giving Statistics
- Scripts
- Make a Gift
- Printable Version

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**Special Note(s)**
Person is Trustee

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**Biographical Giving Information**

<table>
<thead>
<tr>
<th>Classmate</th>
<th>Spouse/Partner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td></td>
</tr>
<tr>
<td>Salutation/Nickname:</td>
<td></td>
</tr>
<tr>
<td>Preferred Email:</td>
<td></td>
</tr>
</tbody>
</table>

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**Home Information**

| Address: | 12345 West Main St |
| City State, ZIP Code: | Baton Rouge, LA 70112 |
| Phone: | 555-987-6543 |
| Cell Phone: |     |

---

**Business Information**

<table>
<thead>
<tr>
<th>Classmate</th>
<th>Spouse/Partner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title:</td>
<td></td>
</tr>
<tr>
<td>Company:</td>
<td>Smith College</td>
</tr>
<tr>
<td>Address:</td>
<td>Dept. of Chemistry</td>
</tr>
<tr>
<td>City State, ZIP Code:</td>
<td>New Orleans, LA 70125</td>
</tr>
<tr>
<td>Phone:</td>
<td>555-520-6356</td>
</tr>
</tbody>
</table>

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**Colby Information**

<table>
<thead>
<tr>
<th>Classmate</th>
<th>Spouse/Partner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major:</td>
<td>Chemistry</td>
</tr>
<tr>
<td>Fraternity/Sorority:</td>
<td>Zeta Psi</td>
</tr>
<tr>
<td>Student Activities:</td>
<td>Basketball</td>
</tr>
<tr>
<td>Alumni Activities:</td>
<td>Reunion (1983)</td>
</tr>
<tr>
<td>Volunteered As:</td>
<td></td>
</tr>
<tr>
<td>Colby Relationships:</td>
<td>Melissa Smith Jones '81 (Sibling)</td>
</tr>
</tbody>
</table>

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This section will only appear if the person has something special that you need to know (i.e., the individual or his/her spouse is a trustee/overseer/trustee emeriti or the individual has requested no contact from Colby.)
Home address and phone information is listed based on where the person is receiving Colby correspondence on the day the information is being viewed.

If the person has requested that Colby not release their address, the address line will read “Private Address” and the rest of the address will be blank.

If the phone number or cell phone field is blank or contains instructions the individual has made a specific request regarding the Colby’s use of this information (i.e. “Use cell phone”, “No Valid Phone”, or “Unlisted and Unknown”).

Up to 8 student, alumni or volunteer activities may appear.

Colby familial relationships and friends will appear here.
Giving and Personal Notes
Only giving to the Colby Fund is shown. Colby couple giving is represented as the total of the gift for each member of the couple.

Ask amounts are for the current fiscal year. Colby’s fiscal year runs from July 1 to June 30.

* Next to a pledge indicates a multi-year pledge that will continue into the next fiscal year.

Colby spouses appear individually in their respective classes. MVP giving information represents the total given by a couple.
### Giving and Personal Notes

#### Total amount of a pledge or scheduled pledge payment due in the year indicated.

#### Amount of cash received in the current fiscal year.

#### Amount of total pledge minus payments received in the current fiscal year.

#### Date of last transaction.

#### Amount of cash received from a corporate matching program for this individual.

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**FY2007 Alumni Fund Ask: $0.00**

<table>
<thead>
<tr>
<th>Alumni Fund</th>
<th>Pledge</th>
<th>Pledge Balance</th>
<th>Cash In</th>
<th>Match</th>
<th>Last Payment Date or Pledge Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY208</td>
<td>$500.00</td>
<td>$500.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>06/01/2008</td>
</tr>
<tr>
<td>FY207</td>
<td>$500.00</td>
<td>$500.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>06/01/2007</td>
</tr>
<tr>
<td>FY206</td>
<td>$500.00</td>
<td>$500.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>04/30/2006</td>
</tr>
<tr>
<td>FY205</td>
<td>$150.00</td>
<td>$150.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>06/21/2005</td>
</tr>
<tr>
<td>FY204</td>
<td>$100.00</td>
<td>$100.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>06/21/2004</td>
</tr>
</tbody>
</table>

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Colby College Annual Giving Office
4120 Mayflower Hill • Waterville, ME • 04901-8843
207-859-4320 • annual@colby.edu
Giving and **Personal Notes**

This area is for your reference only. Colby staff members do not have access to this field. This is not a reporting mechanism for call results or updates.

Each time information is added to the record, the time of update is stored in the system and will be displayed in this section so that you can tell if the information is current.

**NOTE:** To maintain the security and privacy of our alumni, please do not store sensitive information or credit card numbers in this area.

To submit a credit card gift for an assignment, click on the “Make A Gift” link located on the top right of each MVP page under Quick Links.
Resetting (forgotten) your password

If you enter your username and password and the system doesn’t find a match, the following screen will be presented:

Click on the “Forgot Password?” link. The following screen will be shown.
This is the security question you created when you set up your account.

Create your new password. Click on Finish when you’re done.
The following screen will appear if you have been successful.

Resetting (forgotten) your Username
If you are still having trouble please contact the Colby Fund Office at 800-311-3678 or (207) 859-4320.