Mule Volunteer Portal
User’s Guide

For Head Agents,
Reunion and Anniversary Chairs
# Table of Contents

**Introduction** .................................................................................................................................................. 3

**Getting Started** ........................................................................................................................................ 3

*Account Set up* ............................................................................................................................................... 4

*Logging in after initial set up* .......................................................................................................................... 7

**Welcome Page** ............................................................................................................................................... 8

*Quick Links* .................................................................................................................................................... 9

*Messages* ........................................................................................................................................................ 10

*Statistics* ........................................................................................................................................................ 11

**My Assignments** .......................................................................................................................................... 12

  *Agent View* .................................................................................................................................................. 12

  *Assignment Summary* ................................................................................................................................. 15

  *Entire Class View* ....................................................................................................................................... 16

  *Classmate Detail* ......................................................................................................................................... 18

  *Reporting Results back to Colby* .................................................................................................................. 22

  *Submitting Credit Card Gifts* ....................................................................................................................... 22

**Resetting your password** ............................................................................................................................. 23

**Resetting your username** ............................................................................................................................. 23
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 forget your password you will be asked to answer the security questions again to reset your password.

This is the first screen you that should appear (you will only have to go through this process once). Enter your username as supplied to you in an email from Colby and click “Continue”.

MVP Account Set-Up

You will receive your username from the Colby Fund Office. If you do not have your username, please contact 800-311-3678.
Once you have established your account this is the first screen that will appear when you visit www.colby.edu/mvp.
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”.

Enter your password (must be at least 6 characters and contain at least one number). **Passwords are case sensitive**. Once done, click on “Finish”.
This screen should appear once your password is entered and your account is set-up. 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. This log in screen will appear.

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

Welcome Page
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

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 is to have 100% participation from our volunteers.
Message from the Colby Fund staff. This message appears on the “Welcome” page of all volunteers.

You may also communicate to your agents in the messages area. Please let your assigned staffer know if you would like a specific message to appear.
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”.

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.

A.
Status (This will be updated each year with information for the current fiscal year)
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.
Agent View
Head Agents, Reunion or Anniversary Chairs have access to a number of additional tools:

- View the assignments of your agents
- View entire class as a group
- View individual information for each classmate

To view the assignments of your agents, click on “Agent View”.
Jerry has four assignments.
See Entire Class

Click here to view your entire class. **Only** Head Agents, Reunion and Anniversary Chairs have access to the entire class.
Clicking on a class member name, brings you to that person’s Detail page.

Indicates who is assigned to a particular classmate.

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.

<table>
<thead>
<tr>
<th>Class Member</th>
<th>Actor</th>
<th>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>Kevin Adams-Kirk ’83</td>
<td></td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$20</td>
<td></td>
</tr>
<tr>
<td>John T. Alana ’83</td>
<td></td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$25</td>
<td></td>
</tr>
<tr>
<td>Stephen Alvin ’83</td>
<td>J. Gray</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$25</td>
<td></td>
</tr>
<tr>
<td>Phyllis Amella ’83</td>
<td></td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$25</td>
<td></td>
</tr>
<tr>
<td>Justin Anakin ’83</td>
<td></td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$250</td>
<td></td>
</tr>
<tr>
<td>Lisa Kemp Applewood ’83</td>
<td></td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$250</td>
<td></td>
</tr>
<tr>
<td>Margaret Applewood ’83</td>
<td>J. Chaplin</td>
<td>pledge</td>
<td>$2,500</td>
<td>$150</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eliza K. Ball ’83</td>
<td>T. Nichols</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$25</td>
<td></td>
</tr>
<tr>
<td>Diane Schmidt Band ’83</td>
<td></td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$500</td>
<td></td>
</tr>
<tr>
<td>James A. Bard ’83</td>
<td>J. Chaplin</td>
<td>pledge</td>
<td>$1,000</td>
<td>$0</td>
<td>$0</td>
<td></td>
</tr>
</tbody>
</table>
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.

Colby spouses appear individually in their respective classes. MVP giving information represents the total given by a couple.

* Next to a pledge indicates a multi-year pledge that will continue into the next fiscal year.
## Giving and Personal Notes

<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>FY08</td>
<td>$500.00</td>
<td>$500.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>06/01/2009</td>
</tr>
<tr>
<td>FY07</td>
<td>$500.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>06/01/2007</td>
</tr>
<tr>
<td>FY06</td>
<td>$500.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>06/03/2006</td>
</tr>
<tr>
<td>FY05</td>
<td>$150.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>06/03/2005</td>
</tr>
<tr>
<td>FY04</td>
<td>$100.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>06/21/2004</td>
</tr>
</tbody>
</table>

- **Total amount of a pledge or scheduled pledge payment due in the year indicated.**
- **Amount of total pledge minus payments received in the current fiscal year.**
- **Date of last transaction. Or date open pledge is due.**
- **Amount of cash received in the current fiscal year.**
- **Amount of cash received from a corporate matching program for this individual.**
Giving and **Personal Notes**

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**Giving**

FY2007 Alumni Fund Asking: $0.00

<table>
<thead>
<tr>
<th>Year</th>
<th>Alumni Fund</th>
<th>Pledge</th>
<th>Pledge Balance</th>
<th>Cash In</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY06</td>
<td>$500.00</td>
<td>$500.00</td>
<td>$0.00</td>
<td>$500.00</td>
</tr>
<tr>
<td>FY05</td>
<td>$150.00</td>
<td>$100.00</td>
<td>$0.00</td>
<td>$150.00</td>
</tr>
<tr>
<td>FY04</td>
<td>$100.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$100.00</td>
</tr>
</tbody>
</table>

*All giving shown is joint, if applicable.
* A pledge is part of a future year commitment.

**Personal Notes**

(This section is for your own notes about classmates and your attempts to reach them.) Click here to contact the Colby staff.

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**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.

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To report your call results or biographical updates back to Colby click here. Select the AG staffer assigned to your class.
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.

![Image of Colby login screen]

**Forgot Password**

Your password has been reset.

*Return to login page*

Colby College Annual Giving Office
4320 Mayflower Hill • Waterville, ME • 04901-8943
207-872-4320 • annual@colby.edu

**Resetting (forgotten) your Username**

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