MOBILE VOLUNTEER PORTAL USER CHEAT SHEET

STEP 1: Log into MVP

1. Log into MVP by visiting www.mvp.upenn.edu
2. Authenticate with Penn Key and password.
   *NOTE: First time users will be presented with a confidentiality agreement.

STEP 2: Dashboard and Welcome Page

1. Once logged in you will come to the welcome and dashboard page.
2. Alumni Relations and Penn Fund pages are identical minus giving information which is only found on Penn Fund version of MVP.
3. Use “Volunteer Activity” drop down to select the Outreach or Gift committee you would like to work with. [Orange Arrow]
   *NOTE: Class of XXXX = The Penn Fund Gift Committee; Alumni Relations Class of XXXX = Alumni Relations Outreach Committee
4. Click on the “View Assignments” tab above. [Yellow Arrow]

STEP 3A: View and Select Assignments (Classmates)

1. To begin your work as a Penn Fund or Alumni Relations volunteer you must establish an assignment pool to work with.
2. Click on the “Select Additional Assignments” button to begin the selection process. [Yellow Arrow]
3. As you work through the process of selecting your assignments, their information will fill in the area highlighted in the red rectangle.
STEP 3B: Selecting Assignments from List

1. Clicking “Select Additional Assignments” takes you to a list of all members of the class.
2. Searching through your class list has been made easier with the addition of the “Search By” and “Filter By Affinity Groups” drop downs. [Red Rectangle]
3. Red question marks indicate classmates currently unavailable for selection.
4. To add an assignment to your “pool” simply click on the select box next to their name. [Yellow Arrow]
5. After selecting alumni from the list be sure to click “Save Selected Assignments(s) button.” [Orange Arrow]

*NOTE: Clicking “Next” or moving to another page before saving will result in a loss of selections.

6. After selecting and saving assignments, click the “Return to My Assignments” button to view your pool.

STEP 4: E-Mailing Assignments

1. After returning to the view assignments page (image in Step 3A), click on an assignment’s name.

*NOTE: You can sort your list of assignments using the “Search” By and “Filter By” tools on the left.

2. Contact information (and giving history if gift committee) should be displayed (image in Step 5).
3. Click on their email address to generate the “Send Email to Prospect” window.
4. Select an email template from the drop down below — personalize subject line to your liking.
5. To email multiple people, click the “Select Additional Email(s) button” to generate the additional name side bar to the right. [Red Rectangle]

*NOTE: Do not edit the salutation or the HTML in the message. Editing will result in errors in your email.

STEP 5: Log a Contact

1. After substantive outreach to a classmate (conversation, voicemail, or email) be sure to leave a note for your Alumni Relations or Penn Fund liaison.

*NOTE: If you asked for a gift, regardless of outcome, select “Solicitation” as note type. Do not include credit card information in note.

2. At the bottom of the “Assignment Detail” page, toggle the drop downs to reflect the actions taken. [Red Rectangle]

3. Pictured is an example of a note to send your Penn Fund liaison.

*NOTE: When emailing more than one assignment, a contact note to your liaison is automatically generated.