Reunion Pledge Gift Processing - DRAFT for training

The reunion pledge form is a Salesforce form that allows alumni to pledge a multi-year gift to SOM and designate it for a specific cause. These instructions are intended for the staff who are processing the submitted forms.

The reunion gift form is available on the SOM web site at <insert link here>. Once the alumni submits their form, the following actions are taken:

1. The alumni who submits the form receives an eMail confirmation containing all the data from the form.
2. The form stores the data in salesforce in an object called the Reunion Gifts.
3. In addition to the fields collected in the form, the Reunion gift "record" contains some additional fields allowing for the management and processing of the records.
4. Reunion Pledge Gift managers must have access to Salesforce in order to access the records.

Reunion Pledge form

The reunion pledge form displays as follows:
# Reunion Gift Campaign

**I will pledge a total of...**

- [ ] $25,000
- [x] $10,000
- [ ] $5,000
- [ ] $2,500
- [ ] $1,000
- [ ] Other: [ ]

**Other Amount:** [ ]

**Installment in number of years:** [ ]

**Note:** The entirety of your pledge counts toward your class's reunion gift total. First pledge installment due by June 30, unless otherwise notified.

**Please direct my gift to the Alumni Fund**

- Loan Forgiveness

**Or another pledge designation**

- Other pledge designation test

**Comments**

- Comments test

**First Name:** Adriene

**Last Name:** Radcliffe

**Class Year:** 2000

**Preferred E-Mail:** radartrockss@gmail.com

**Program:** MBA

**Permanent Address:**

- **Permanent Address Line 1:**
  - 122 Jacks Hill Road

- **City:** Oxford

- **State/Province:** Connecticut

- **Zip/Postal Code:** 06478

- **Country:** United States

**Phone:** 2038898971

**Employer:** Yale my employer

**Employer Address (if known):**

- **employer address test**
  - 121 Whitney Ave

- **My spouse and/or I work for a matching gift company**

**Click here** to check matching gifts

**Submit**
eMail Confirmation snapshot
Dear Adriene,

Thank you for your important commitment to your class’s Reunion Gift Campaign!

Your generosity will support Yale SOM and provide critical resources for the school’s core priorities. By participating in your class’s Reunion Gift Campaign, you are ensuring that SOM can continue its mission of educating leaders for business and society.

**Total Gift Intention:** $25,000.00  
**Total Gift Installment Years:** 3

**Personal Information:**  
Name Adriene Radcliffe  
Preferred eMail adriene.radcliffe@yale.edu  
Phone 2034942867

**Preferred Address:**  
122 Jacks Hill Rd  
second address line  
Oxford  
CT  
United States  
06478

**Pledge Designation:** The Alumni Fund  
**Pledge Designation Other:** Use for Alumni Events only  
**Comment:** This is a comment field - 25K in 3 installments

**Matching Gift: 1**  
**Employer:** Yale U  
**Pledge Designation:** Harvard

Thank you for your pledge. A member of the Reunion Giving team will be reaching out to you personally to confirm your commitment.

Many thanks,

Julia Hsieh ’10 M.Phil.  
Deputy Director, Reunion Giving  
(203) 436-9498  
[Julia.Hsieh@yale.edu](mailto:Julia.Hsieh@yale.edu)
Step-by-step guide to managing the incoming records

1. Login using your salesforce name (usually your eMail address and a selected password) to salesforce by navigating to https://yale-som.lightning.force.com/

2. Once you are logged in, you will be at the Salesforce home screen.

3. In order to navigate to the Reunion Gifts area click the Salesforce Application picker in the top left corner

4. From the list of Salesforce Applications select Alumni Relations and you will navigate to the set of tools and objects for this group of programs

5. The Reunion Gift object is available from the top Salesforce navigation menu

6. When you click on the Reunion Gifts menu a list of the gifts will appear in the order they were submitted. Columns can be sorted simply by clicking the title, and it will toggle between ascending and descending order

<table>
<thead>
<tr>
<th>Alumni Relations</th>
<th>Home</th>
<th>Recent</th>
<th>Setup</th>
<th>Help</th>
<th>Objects</th>
<th>Broadcasts</th>
<th>Setup by Topic</th>
<th>Help Desk</th>
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<th>Amount</th>
<th>Credit Card</th>
<th>State</th>
<th>City</th>
<th>Zip</th>
<th>Email</th>
<th>Phone</th>
<th>Relationship</th>
</tr>
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<tr>
<td>John Smith</td>
<td>$5000</td>
<td>Visa</td>
<td>CA</td>
<td>Palo Alto</td>
<td>94301</td>
<td><a href="mailto:john.smith@gmail.com">john.smith@gmail.com</a></td>
<td>415-555-1234</td>
<td>Alum</td>
<td></td>
</tr>
<tr>
<td>Jane Doe</td>
<td>$1000</td>
<td>MasterCard</td>
<td>NY</td>
<td>New York</td>
<td>10001</td>
<td><a href="mailto:jane.doe@gmail.com">jane.doe@gmail.com</a></td>
<td>212-555-1234</td>
<td>Alum</td>
<td></td>
</tr>
<tr>
<td>Robert Johnson</td>
<td>$2500</td>
<td>American Express</td>
<td>TX</td>
<td>Houston</td>
<td>77002</td>
<td><a href="mailto:robert.johnson@gmail.com">robert.johnson@gmail.com</a></td>
<td>713-555-1234</td>
<td>Alum</td>
<td></td>
</tr>
<tr>
<td>Emily Wilson</td>
<td>$750</td>
<td>Discover</td>
<td>FL</td>
<td>Miami</td>
<td>33131</td>
<td><a href="mailto:emily.wilson@gmail.com">emily.wilson@gmail.com</a></td>
<td>305-555-1234</td>
<td>Alum</td>
<td></td>
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<tr>
<td>Michael Brown</td>
<td>$1500</td>
<td>PayPal</td>
<td>CA</td>
<td>San Francisco</td>
<td>94111</td>
<td><a href="mailto:michael.brown@gmail.com">michael.brown@gmail.com</a></td>
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7. To view an individual record, click on the arrow to the right of the row and select **Edit**

![Image of a Reunion Gift record form](image_url)

- **Reunion Gift Name**: aOG3C000001.m0t9
- **Owner**: Adriene Radcliffe
- **Total Gift Amount**: $25,000.00
- **Installment**: 3
- **Program**: MBA
- **Pledge Direction**: The Alumni Fund
- **Staff Contact**: Search Staff...
- **Gift Processed**: 
- **Internal Notes (Reunion Gift)**

8. Data fields you can update during your management of the record include:
   a. Ability to assign the record to yourself or another staff member by clicking on **Staff Contact**
   b. Add notes about the processing of the record by entering them in the **Internal Notes (Reunion Gift)** field
   c. Change the status of the record by noting the record has been processed by checking the box **Gift Processed**
   d. If you have added notes or changed any field values, click the **Save** button to submit the changes to the record
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Results: 10 rates

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