



## Alumni & Friends Portal

*Three Rivers Systems, Inc*

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### **Abstract**

This document is designed to provide information necessary to use the Alumni & Friends portal. Constituents will be able view their own information from anywhere they have access to the Internet. The following items are discussed:

- Alumni & Friends Home
- Contribute by mail
- Donate OnLine
- My Pledges
- My Gifts
- My Soft Credits
- My Totals
- My Addresses
- Change Password
- Alumni Directory

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# Alumni & Friends Portal

The Alumni & Friends portal provides constituents access to their personal information and provides the ability to contribute online pledges and donations.

The login window displays when accessing the Alumni & Friends Portal.

Figure 1: Login

## Logging In



### Step-By-Step: Logging into the Alumni & Friends Portal

The constituent must supply their **User Name** and **Password** to log in.

1. Enter the **User Name** and **Password**.
2. Click the **Log In** button. The Alumni & Friends Portal Home page displays. The links on the left of the page access information specific to the constituent logged in.

## Navigating the Home Page

Once logged in, the Alumni & Friends Portal home page displays. The Alumni News section displays news and announcements, which are entered through CAMS Enterprise >CAMS Manager >CAMS Portal >Portal News.

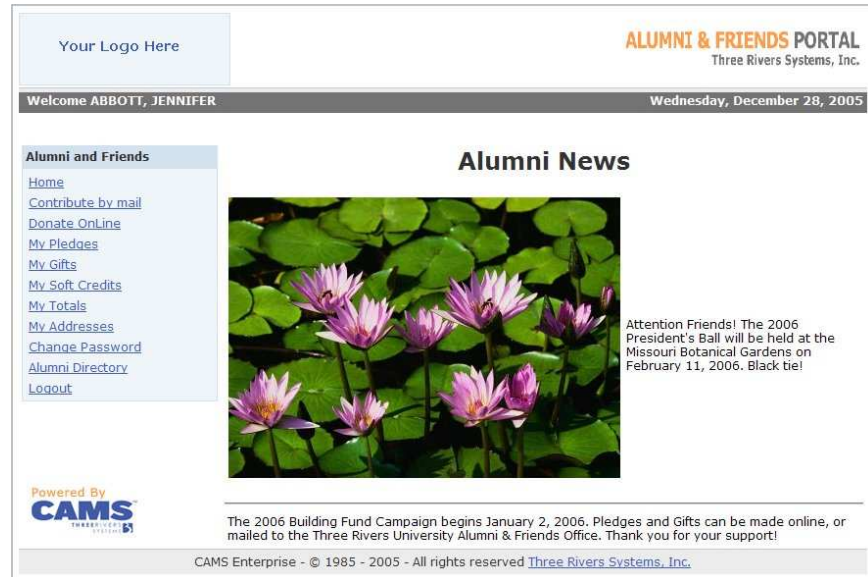


Figure 2: Alumni & Friends Portal Home Page

The following items are accessible by clicking the corresponding link:

- [Contribute by mail](#)
- [Donate OnLine](#)
- [My Pledges](#)
- [My Gifts](#)
- [My Soft Credits](#)
- [My Totals](#)
- [My Addresses](#)
- [Change Password](#)
- [Alumni Directory](#)

## Contribute by mail

The Contribute by mail link accesses the institution’s Fundraising and Development office mailing address. Constituents can mail contributions to this address.



Figure 3: Contribute by mail

## Donate OnLine

The Donate OnLine link provides constituents with a tool to make contributions through the portal. Donations can satisfy payment on a pledge, or can be a regular gift.



Figure 4: OnLine Gift Donation



## Step-By-Step: Donate Gifts OnLine

1. Click **Donate OnLine**. The **On Line Gift Donation** page displays. Determine whether the donation should be attached to an existing pledge, or whether it should be applied as a regular gift to the campaign of your choice.
2. To apply the gift to an existing pledge, click the down arrow in the **Attach Pledge** field. A list of open pledges displays. Click the appropriate pledge, and then enter the **Gift Amount**. If nothing displays, an open pledge does not exist, and the donation must be made as a regular gift.

The screenshot shows a form titled "Gift attached to a pledge". It contains two fields: "Attach Pledge" with a dropdown menu showing "11/28/2005 - John Rosen Scholarship Fund - Balance=\$2,200.00" and "Gift Amount" with a text input field containing "200.00".

Figure 5: Gift attached to a pledge

3. To apply the donation as a regular gift, click the down arrow in the **Campaign** field. A list of campaigns displays. Select the appropriate campaign, and then enter the **Gift Amount**.

The screenshot shows a form titled "Regular gift". It contains two fields: "Campaign" with a dropdown menu showing "Dawson Student Computer Lab" and "Gift Amount" with a text input field containing "1000.00".

Figure 6: Regular Gift

4. Click the **Proceed** button to continue.
5. The Amount to pay confirmation displays. Click the **submit** button to continue to the secure online credit card entry window.

The screenshot shows a form titled "Amount to pay confirmation". It contains a text input field for "Amount to pay with your credit card:" with the value "100.00". Below the field is a paragraph of text: "When you click submit, you will be redirected to VeriSign. Please enter your credit card information on VeriSign's Secure Site." At the bottom right is a "submit" button.

Figure 7: Amount to pay confirmation

6. Enter the **Credit Card Number**, and **Expiration Month** and **Year**. Click the **Continue** button.

### Credit Card Information

Card Number:

Cards Accepted - American Express - Diner's Club - Discover - Enroute - JCB - MasterCard - Visa

Exp Date:



Figure 8: Credit Card Information

- Verify Order Info, Credit Card Information, and Billing Information, and then click the **I Authorize this transaction** button.

### Order Info

Total Amount: \$100.00

### Credit Card Information

Card Number 4111111111111111  
Cards Accepted- American Express - Diner's Club - Discover - Enroute - JCB - MasterCard - Visa

Exp Date

### Billing Information

Name  \*

Address  \*

City  \*

State  \*

Zip Code  \*

Phone 314.555.1212

Email mquackenbush@domain.com

**\*Required field**

Please note that we only support the US-English character set. In order to ensure that your transaction is processed correctly, please refrain from using International Characters.

Figure 9: Confirm order, review/change Billing Information, Authorize transaction.

8. A final confirmation displays before submitting the transaction for processing. Review the information for accuracy, and then click the **Submit Transaction for Processing** button.

Please Confirm that the information below is correct.

### Confirmation

|               |   |
|---------------|---|
| Card Number:  | 4111111111111111  |
| Exp Date:     | 1207  |
| Total Amount: | \$100.00  |
| Bill To:      | Marcia Ann Quackenbush<br>1254 Tripton Court<br>St. Louis MO 63123<br>314.555.1212<br>mquackenbush@domain.com |

Submit Transaction For Processing      << Back

Figure 10: Submit Transaction For Processing

9. Once the credit card is authorized, the transaction is approved. Print this page with the reference # for your records. Click the **Return to Shopping** button to return to the Alumni & Friends Portal Home page.

### Your transaction was approved!

|               |   |
|---------------|---|
| Reference #   | V64A0AC99513  |
| Total Amount: | \$100.00  |
| Bill To:      | Marcia Ann Quackenbush<br>1254 Tripton Court<br>St. Louis MO 63123<br>314.555.1212<br>mquackenbush@domain.com |

Return to shopping

Figure 11: Transaction Approved.

## My Pledges

My Pledges lists all pledges made to the institution, including open (some pledge payments remaining) and closed (all pledge payments made) pledges. The Pledge Date, Pledge Status (Open or Closed), Campaign, Pledge Amount, Amount Paid (to date), and the Balance Due display.

The screenshot shows the 'My Pledges' page. The navigation menu on the left includes: Home, Contribute by mail, Donate OnLine, My Pledges (highlighted), My Gifts, My Soft Credits, My Totals, My Addresses, Change Password, Alumni Directory, and Logout. The main content area features a table with the following data:

| Pledge Date | Pledge Status | Campaign                    | Pledge Amount | Amount Paid | Balance Due |
|-------------|---------------|-----------------------------|---------------|-------------|-------------|
| 12/5/2005   | CLOSED        | Stadium Building Fund       | \$500.00      | \$500.00    | \$0.00      |
| 11/28/2005  | OPEN          | John Rosen Scholarship Fund | \$2,400.00    | \$200.00    | \$2,200.00  |

Figure 12: My Pledges

## My Gifts

My Gifts lists all gifts made to the institution to date. The Gift Date, Campaign, Gift Amount, Pledge Attached (Yes or No) display.

The screenshot shows the 'My Gifts' page. The navigation menu on the left includes: Home, Contribute by mail, Donate OnLine, My Pledges, My Gifts (highlighted), My Soft Credits, My Totals, My Addresses, Change Password, Alumni Directory, and Logout. The main content area features a table with the following data:

| Gift Date  | Campaign                    | Gift Amount | Pledge Attached |
|------------|-----------------------------|-------------|-----------------|
| 12/28/2005 | Football Scholarships       | \$100.00    | No              |
| 12/28/2005 | John Rosen Scholarship Fund | \$200.00    | Yes             |
| 12/28/2005 | Stadium Building Fund       | \$500.00    | Yes             |

Figure 13: My Gifts

## My Soft Credits

My Soft Credits lists all soft credits received to date. A soft credit is applied to the constituent's account when their joint account designates a gift to be applied as soft credit. The Gift Date, Campaign, and Amount display.

The screenshot shows the 'ALUMNI & FRIENDS PORTAL' interface. The user is logged in as QUACKENBUSH, MARCIA ANN. The page title is 'My Soft Gifts'. A table displays the following data:

| Gift Date  | Campaign              | Amount   |
|------------|-----------------------|----------|
| 12/28/2005 | Stadium Building Fund | \$500.00 |

Figure 14: My Soft Credits

## My Totals

My Totals lists total contributions made to the institution during each giving year (as defined by the institution) up to the current date. The Giving Year, Gift Cash total, Gift Non Cash total, Soft Credit total, Pledge total, Total Yearly Giving amount (sum of Gift Cash, Gift Non Cash, and Soft Credit totals for that Giving Year), Giving to Date (sum of Gift Cash, Gift Non Cash, and Soft Credit totals for all Giving Years), Pledge to Date (sum of Pledges for all Giving Years), and Unpaid Pledge Amount (sum of all Pledges for all Giving Years which remain unpaid) display.

The screenshot shows the 'ALUMNI & FRIENDS PORTAL' interface. The user is logged in as QUACKENBUSH, MARCIA ANN. The page title is 'My Totals'. A note states: 'Totals reflect a fiscal year start date of June 1'. A table displays the following data:

| Giving Year | Gift Cash | Gift Non Cash | Soft Credit | Pledge     | Total Yearly Giving | Giving to Date | Pledge to Date | UnPaid Pledge Amount |
|-------------|-----------|---------------|-------------|------------|---------------------|----------------|----------------|----------------------|
| 2006        | \$800.00  | \$0.00        | \$500.00    | \$2,900.00 | \$1,300.00          | \$1,300.00     | \$2,900.00     | \$2,200.00           |

Figure 15: My Totals

## My Addresses

My Addresses lists all active addresses for the constituent on record in the Development module in CAMS Enterprise. Addresses not marked Active do not display in the portal. Constituents may modify active addresses through the portal.

| Edit                 | Type    | Primary | Listing                                   | Email                   |
|----------------------|---------|---------|---|-------------------------|
| <a href="#">Edit</a> | Billing | No      | 1254 Tripton Court<br>St. Louis, MO 63123 | mquackenbush@domain.com |
| <a href="#">Edit</a> | Home    | Yes     | 1254 Tripton Court<br>St. Louis, MO 63123 | mquackenbush@domain.com |
| <a href="#">Edit</a> | Local   | No      | 1254 Tripton Court<br>St. Louis, MO 63123 | mquackenbush@domain.com |

Figure 16: My Addresses



### Step-By-Step: Edit an Address

1. Click **My Addresses**. The **My Addresses** page displays.
2. Click the **Edit** link next to the address to update. The address entry page displays.

Figure 17: Address Entry page

3. Key over existing information to change. Fields with red labels are required. The record will not save if information is missing from any one of required fields.
4. Click the **Save** button. The My Addresses page returns with the updated information displayed.

## Change Password

Change Password allows the constituent to change the password required when logging into the Alumni & Friends portal. Regular password changing is recommended for increased security.

Figure 18: Change Password



### Step-By-Step: Change Password

1. Click **Change Password**. The **Change Password** page displays. All fields are required. Changes appear encrypted in all fields for security reasons. Passwords must have minimum 6 and maximum 15 characters and are case sensitive.
2. Type the **Old Password** and then type the **New Password**. Next, **Re-Type New Password**.
3. Click the **Change Password** button. A confirmation message displays: "Password Change Attempt Successful". The next time the constituent logs into the Alumni & Friends Portal the changed password will be required.

## Alumni Directory

**Alumni Directory** allows the constituent to search the database for other alumni. Constituents may also designate whether their class year, city, state, country, and email should display on the directory for other alumni to see.

Your Logo Here

**ALUMNI & FRIENDS PORTAL**  
Three Rivers Systems, Inc.

Welcome QUACKENBUSH, MARCIA ANN
Wednesday, December 28, 2005

**Alumni and Friends**  
[Home](#)  
[Contribute by mail](#)  
[Donate OnLine](#)  
[My Pledges](#)  
[My Gifts](#)  
[My Soft Credits](#)  
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[Logout](#)

Last name

First name

Class Year

Degree

Show my information (class year,city,state,country,email) on directory for other alumni to see

Powered By

Figure 19: Alumni Directory



## Step-By-Step: Search Alumni Directory

1. Click **Alumni Directory**. The **Alumni Directory** page displays. The **Last name** and **First name** fields can be searched incrementally. Typing a portion of either or both will display all matches. **Class Year** requires a four-digit entry. **Degree** requires a selection from the list accessed by clicking the down arrow.
2. Enter the appropriate search criteria, and then click the **Submit Query** button. The My Alumni page displays with all records that match the search criteria.

| My Alumni               |       |              |       |         |                          |  |
|-------------------------|-------|--------------|-------|---------|--------------------------|--|
| Name                    | Class | City         | State | Country | Email                    |  |
| Quackenbush, Marcia Ann | 2003  | St. Louis    | MO    | -       | <a href="#">Email Me</a> |  |
| Quallen, Loralai        | 2004  | Chesterfield | MO    | -       | <a href="#">Email Me</a> |  |
| Quillian, Meyer         | 2001  | Ballwin      | MO    | -       | <a href="#">Email Me</a> |  |
| Quinlan, Madison        | 1975  | St. Louis    | MO    | -       | <a href="#">Email Me</a> |  |
| Quinn, Donovan K        | 2006  | Kirkwood     | MO    | USA     | <a href="#">Email Me</a> |  |
| Quinn, Julie            | 1989  | Ferguson     | MO    | -       | <a href="#">Email Me</a> |  |
| Quinton, Alexis         | 2002  | St. Louis    | MO    | -       | <a href="#">Email Me</a> |  |
| Quinton, Meghan         | 2001  | Crestwood    | MO    | -       | <a href="#">Email Me</a> |  |
| Quirken, Daniel         | 2000  | O'Fallon     | MO    | -       | <a href="#">Email Me</a> |  |

Figure 20: My Alumni

3. If desired, click the **Email Me** link next to a constituent name to open the email client with that person's email address in the To field.

## Logout

Click the **Logout** button to disconnect from the Alumni & Friends Portal. The home page returns with the Login fields displayed.

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