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University Advancement - Advancement Operations

Welcome

The Advancement Operations SharePoint site has been designed as a collaborative work environment and resource center for documents and forms. The SharePoint site is accessible to you online and through the mobile app. Suggestions for content are always welcome.

📂 June 2021 Gift Log   📂 Wealth Engine   📂 Gift Info and Form Documents

Talisma Fundraising References

Go to Subsite

Prospect Research

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News, Articles, Webinar Recaps
See all

+ Add ⌄

Giving Links

- Stock Transfer
- Matching Gifts
- Planned Giving
- Give Campus Site

Marketing Links

- Advancement Dropbox
  - *Contact Erin for Username/Password*
- School Nameplates
- University Wordmark
- The Mercerian

Informational Links

- President's Report
- Strategic Plan

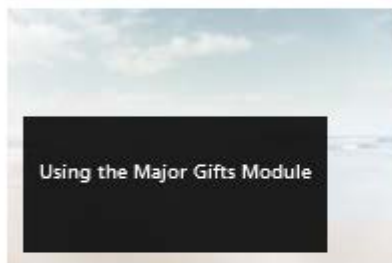## IRS Links

+ New ∨   ↳ Send to ∨   ⟲ Promote   ⊞ Page details   ⧉ Immersive Reader   ⊞ Analytics

UNIVERSITY ADVANCEMENT

Prospect Research

Chrystal A. Bate
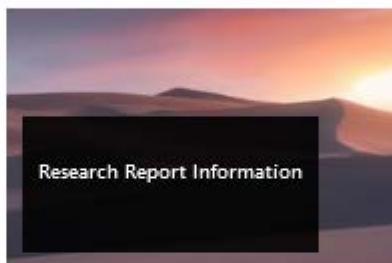Director Of Advancement Services

The Prospect Research SharePoint site has been designed as a collaborative work environment and resource center for documents and forms. The SharePoint site is accessible to you online and through the mobile app. Suggestions for content are always welcome.

Using the Major Gifts Module

Research Report Information

Request a Research Report

Guides are provided to assist you in navigating the Major Gifts Module as well as generate reports.

How to Pull Your Pipeline

Each report updates information within the prospect's Talisma record.
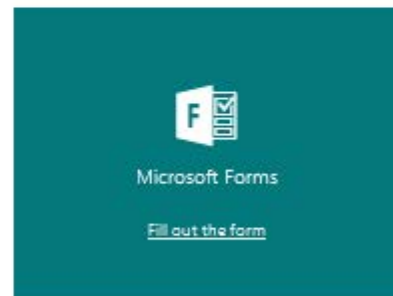
Primary Report
Ensure that there is substantial biographical and philanthropic information for a network peer introduction with donor prospect. Develop an expanded profile report based on engagement information described in call report.

Deep-Dive Report
Wealth screening verification to determine donor's estimated capacity and propensity for increased giving.

Microsoft Forms

Fill out the form

Use for prospects not in your current pipeline.

Your folder contains detailed profile reports for prospects from your pipeline and special requests. Each time a new report is added to your folder you will receive an email alert via Microsoft Flow.

Prospect Research and Pipelines

See all

+ New ∨   ⬆ Upload ∨   ⊞ Edit in grid view   ⟐ Export to Excel

≡ All Documents ∨   ⓘ

☐   Name ∨   Modified ∨   Modified By ∨

Adv.Svc. - Student Workers   Private group

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Welcome!

The Advancement Services - Student Worker SharePoint is a collaboration and workspace site.

Please enter your designated subsite (below) to find your work documents and instructions.

Helpful Resources

Talisma Fundraising Database

Student Payroll

Services Students Subsite

Enter Services Site

Phonathon Students Subsite

Enter Phonathon Site

Scanning Project Subsite

Enter Scanning Site

Guides - All Areas

- Correcting and Updating Addresses
- Obituary Updates

Services Students

+ New ⌄   ⚙ Page details   📊 Analytics

Services Projects

Below you will find a link to the Projects List. Follow the steps below.

1. To begin a project click on the project's title.
2. The project will open with instructions.
3. Update the status field to 'In-Progress'
4. Review instructions, ask for clarifications from CAB, complete project.
5. Update the status field to 'Complete'

Go to Projects List

Documents

See all

+ New ⌄   ⋯   ☰ All Documents ⌄   ⓘ

📄	Name ⌄	Instruc
📁	Adreana - Documents	Files cor projects your fol allow yo progres
📁	Emily - Documents	Files cor projects your fol allow yo progres
📁	Saloni - Documents	Files cor projects your fol allow yo progres