Q31

Would you like to provide any additional feedback, or ideas for improvement, regarding fundraising in GAIL?

Response: When deleting a plan, it would be nice if it would delete the plan, steps and opportunity in one click, without having to manually delete everything individually.

Answer: We agree! This would be a nice feature. We are currently looking into how we can make a one-click historical plan.

Response: All staff meeting with donors need to record their interactions. Even if the interaction is not highly detailed, knowing who one might contact to gather information would be helpful.

Answer: We have recently been making decisions on how to shorten the interaction process. Hopefully these new changes will make entering information quicker and help encourage our GAIL users to include more interactions on our constituents.

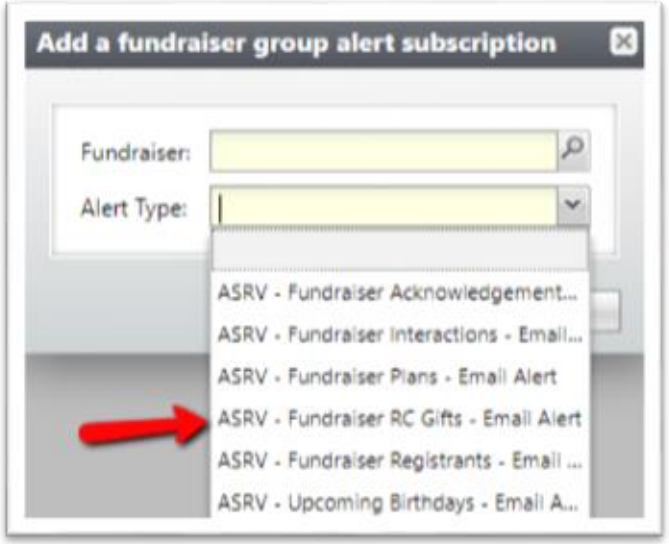
Q31

Response: I would love email notifications letting me know when revenue associated with a plan has been booked.

Answer: If you are a fundraiser, you can set up email alerts from the Prospects functional area within the My UGA Email Alerts page. The Fundraiser RC Gifts alert emails you when revenue has been committed to a plan. Other alerts include your prospects' birthdays and events they have registered to attend.

Response: I would like email notifications for expired plans steps.

Answer: Soon a new alert type will be added to the current drop-down menu that emails you when you have an expired step or a step that is soon to be expired. Stay tuned!

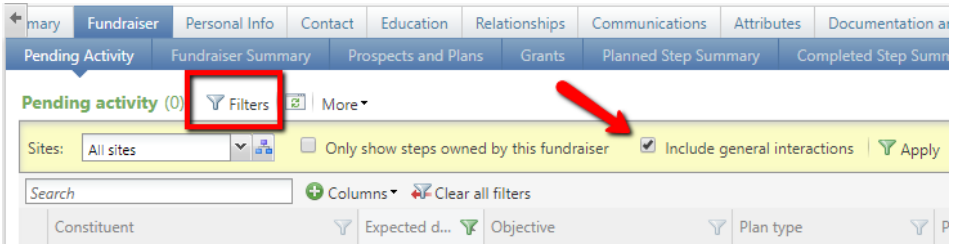


Q31

Response: Eliminate some of the extra tabs in the system. For example, in a plan, what is the difference in "planned" and "pending"? Is it necessary to have both?

Answer: Not everyone uses both planned and pending steps but for those who do, they can be very helpful! Pending steps signify tasks you are actively working on. Planned steps show what tasks you have lined-up after your pending step is complete. If you create planned steps in GAIL, you never have to wonder "what's next".

Response: I wish there was a way to track pending steps that are not part of a plan.



Answer: From your pending activity tab, display your filters and click to Include general interactions. This will allow you to display both pending plan steps and pending interactions on a single screen.