

GAIL 2018 HIGHLIGHTS

STEWARDSHIP TILE

This new constituent tile allows users to see at a glance whether a constituent is a Stewardship Recipient of a fund, and will include a scrolling list of all funds they are a Stewardship Recipient for, as applicable.



PLAN DASHBOARD

Each prospect plan in GAIL now includes a PLAN Dashboard tab. The purpose of this tab is to bring together multiple details of a plan for viewing at a single glance.



CONSTITUENT TIMELINE

A timeline tab is located on each constituent's profile and visually displays how frequently an individual interacts with UGA and how often we communicate in return. Filtering allows you to view only specific areas of interest such as donations, interactions, event invitations, and marketing efforts.

Next Step Summary Opportunities Funding Interests Plan Narrative Plan Timeline



DEGREE ADDITIONS

UGA alumni education data in GAIL was updated to include majors, minors, and certificates.



BEE GRID VIEW

This BEE update allows for the ability to toggle back and forth between a grid view and a list view when uploading/inserting images to your file manager.



When your file manager is set at grid view, your images will be displayed as larger thumbnails, thus making it easier to locate your desired image.

"CLASS OF" NAMETAGS



Additional columns have been added to your Excel spreadsheet when downloading your final guest list from the Registrants-More Details tab. These new columns contain abbreviated class years and degrees to assist with printing event name tags. (Ex. MBA '18)

DME DASHBOARD

Each marketing effort in GAIL now includes a DME Dashboard tab. The purpose of this tab is to streamline the marketing effort setup process. The new tab contains four of the most essential marketing effort settings: Source Code, Address Processing Options, Exclusions, and Segments.



FUNDRAISER SHORTCUTS



Several shortcut hyperlinks have been added in GAIL to aid fundraisers and provide quicker navigation between prospects of groups, my fundraiser pages, and constituent records.

BEE UNDO OPTION



BEE's "undo" option lets you remove changes made to your email content. Use these tools to undo a single edit or jump back in time to several edits past.

BEE SALUTATIONS

Merge tags in BEE have been updated to include both formal and informal salutations. Users have the ability to choose whether they'd like to address constituents as...



EMAIL STATISTICS REPORT

Enhancements made to the email statistics report make it easier to search for and locate a previously sent email through GAIL. These updates include the ability to search by your email name, filtering column headers that remain sticky, and choosing which email data you want to see or not see.



RESEARCH TAB

This new constituent profile tab gathers prospect info from different areas of GAIL and places the data on one page. The tab reflects pertinent modeling score/rating information, prequalification notes, profile information, and research confirmed assets.



DECLINE RSVP

Event invitees can now send regrets via the online event registration page.

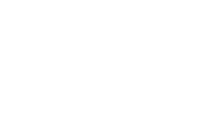
Constituents who have declined RSVP communications will appear under the "Regret Responses" tab within the event.

BIRTHDAY ALERTS

Fundraisers with "prospects of" groups will begin receiving a birthday email alert on the last day of every month.

This email will display the next 40 days of birthdays for members of your "prospects of" group.

BIRTHDAY ALERTS



CUSTOM EDUCATION TILE

Built the original constituent education tile, the new custom education tile displays both its original data (like degree and class year) and also shows the school/college and major.

PENDING BATCH REPORT

A new Pending Batch Revenue report has been added to the Revenue functional area of GAIL.

This new report shows gift revenue given to the Foundation that is currently pending in batch.

By running this report, GAIL users will know in but has not yet been processed by the Gift Accounting team.

EVENT LIST

The event list gives you the ability to view data from multiple events at a single glance. Use the provided filters to organize events by site and date. Data columns include information regarding the number of constituents invited to the event, as well as invitees who registered or declined the invitation.

UPDATED RESEARCH REQUEST TAB

The names of prospects that research has been requested on have been added to the Research Request tab.



LOCATING OPPORTUNITIES

A new shortcut has been added to the Pending Activity page on the Fundraiser tab. When the name of a prospect on your list is selected, you can now select 'Opportunities' from the list of actions displayed and you will be taken directly to the opportunities tab of the prospect's plan.

