A UVA Fundraiser's Guide to Tech Tools

For support and guidance, visit the UVA Advancement Hub, contact the UVA Advancement Help Desk or email dev-analytics@virginia.edu or Telfair@virginia.edu. Access Tableau dashboards. Access EverTrue.

VIEW CONSTITUENT DETAILS	Must Do in Advance	EverTrue Constituent Profile	Tableau Constituent Profile
If you are primarily interested in seeing more robust giving data, use the Tableau Constituent Profile.			
suggest an update to a record		X	X
contact information		X	X
strategy notes		X	X
alerts		X	X
team assignments and if spouse is assigned		X	X
ratings, scores, and suspect pools		X	X
Interactions (contact reports)		X	X
proposals		X	X
pledge balances		X	X
pledge payment schedules			X
total years of giving overall		X	X
total lifetime giving		X	X
largest gift (to area & overall)		X	X
last gift		X	X
matching gifts		X	X
transaction list		X	X
distinguishing legal and soft credit		X	X
solicitation codes, including omits		X	
school/unit giving society memberships		Lawn, Cornerstone, and Rotunda	X
committee memberships		active memberships for the top volunteer leadership committees across Grounds and any other committees that committee owners have chosen to include in ET	X
suspect pools		X	X
school, major, graduation year, UVA activities, and UVA athletics		X	X
birthday/birth year			X
social media accounts (LinkedIn, twitter, Facebook) and interests, profile pics, UVA connected Facebook page activity, career updates (promotion, retirement, etc.), Zillow property values, wealth indicators for net worth of $1Million+ including board and trust roles, philanthropic giver, top political donor, etc.		X	
event data	X	EventBrite only	

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gender, race, ethnicity	X		
comprehensive gift views with details	X		
donor financial and recognition statements	AP		
geo codes (club codes)	X		
INTERACTIONS (contact reports)	**Must Do in Advance**	**EverTrue**	**Tableau**
enter, edit, or delete an interaction you had with a constituent		X	
enter, edit, or delete an interaction you entered for someone else		X	
use talk to text to dictate an interaction on mobile		X	
analyze interactions			Contact Reports
enter an interaction with more than 2 constituents or more than 3 fundraisers	X		
mass add interactions (e.g., scheduling attempts, holiday cards, acknowledgements)	X	ThankView interactions are automatically added	
email colleagues on single interactions	X		
PROPOSALS	**Must Do in Advance**	**EverTrue**	**Tableau**
enter, edit, and manage proposals		X	
analyze proposals including those with incomplete data and pipeline $ calculations			Proposal Summary
TRIPS	**Must Do in Advance**	**EverTrue**	**Tableau**
organize and execute trips (add constituents, schedule meetings, find filler visits, add interactions, share itineraries, add trip collaborators), sync meetings to your Outlook and save your trip histories, use a mobile app to execute trips on the road		X	
SEGMENTS/LISTS	**Must Do in Advance**	**EverTrue**	**Tableau**
pull, save, and share a dynamic list using a set of filters, or a static list using IDs or emails; get alerts when new constituents match your criteria; export results		X Constituents Saved Searches	X New High Propensity Explore Donors More Prospecting Tools on the BI Portal

PROSPECT MANAGEMENT	Must Do in Advance	EverTrue	Tableau
stage your portfolio prospects and see how long they have been in their current stage		X Portfolio View development administrative partners can request access to do this for gift officers	
manage your assigned Discovery/Referral tasks		X Portfolio View	X
set alerts and get notifications for gifts, interactions, proposals, deceased, assignments, etc.		X	X Portfolio Digest includes birthdays
analyze your portfolio including time-in-stage, portfolio crossover with other gift officers, and portfolio penetration			X DO Portfolio
review activity and progress toward goals			X DO Scorecard FY Summary FY DO Details
enter strategy notes	X	coming soon	

CAMPAIGN PROGRESS AND ANALYSIS	Must DO in Advance	EverTrue	Tableau
see official campaign numbers and year-over-year comparisons for your school or unit; segment data by purpose, allocation, appeal, and more			X Campaign Reporting
analyze campaign donors by giving range, allocations, geography, assignment status, and more; paste in IDs or allocation lists to see & explore campaign giving profiles for that population			X Campaign Donors

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			X
monitor incoming transactions for your program, see summary statistics, and receive alerts when gifts, pledges, and pledge payments are made to your area or from a specific donor or list of donors or allocations			Daily Transactions