PORTSMOUTH
ABBEY
SCHOOL

AGENTSPHERE

ONLINE VOLUNTEER PORTAL USER GUIDE

- **AgentSphere is an online portal that gives volunteers (Class Agents, Decade Chairs, and Reunion Chairs) access to up-to-date contact information and giving history for Portsmouth Abbey alumni.**
- **AgentSphere allows volunteers to:**
  - Send emails to individuals or groups
  - Record and track pledges and contact activity
  - Update addresses and contact information
- **Login on your computer or mobile devise:**

www.portsmouthabbey.org/volunteer

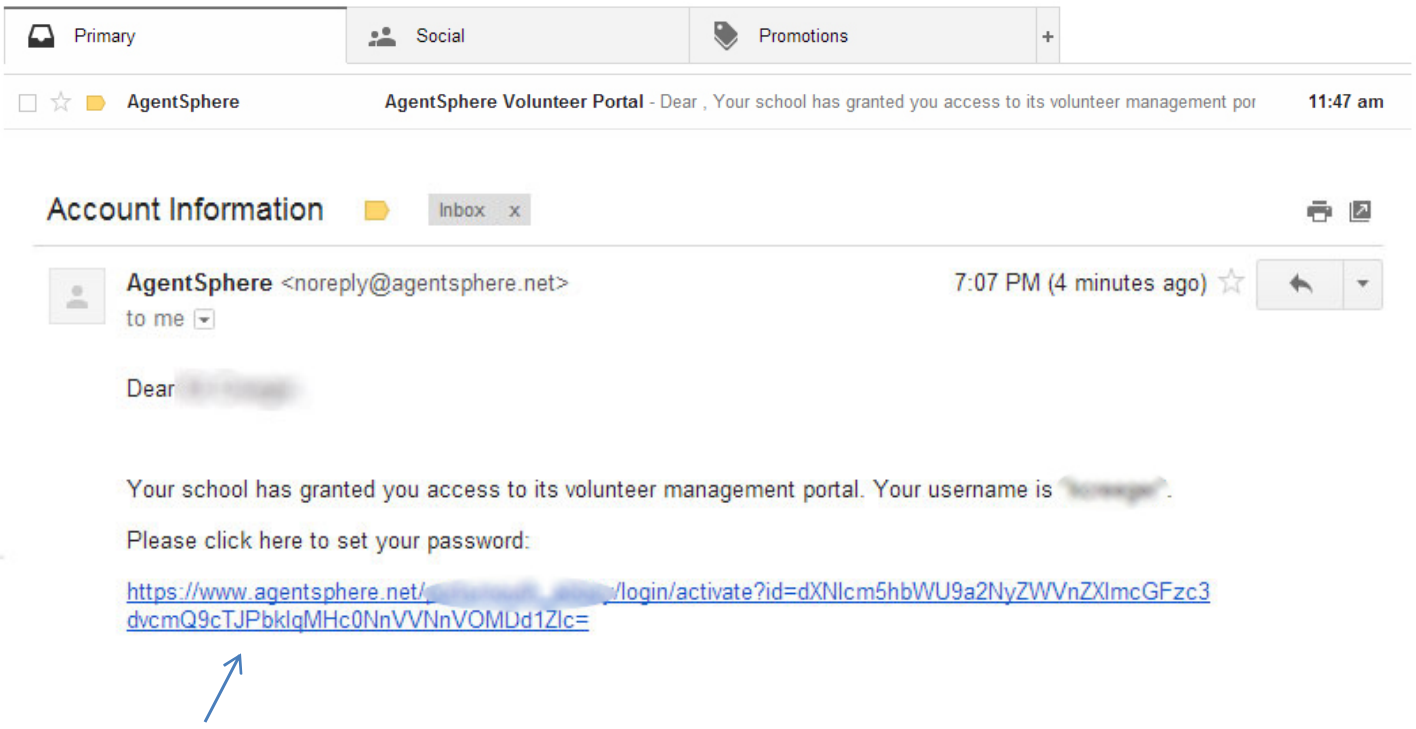
or

www.agentsphere.net/portsmouth_abbey

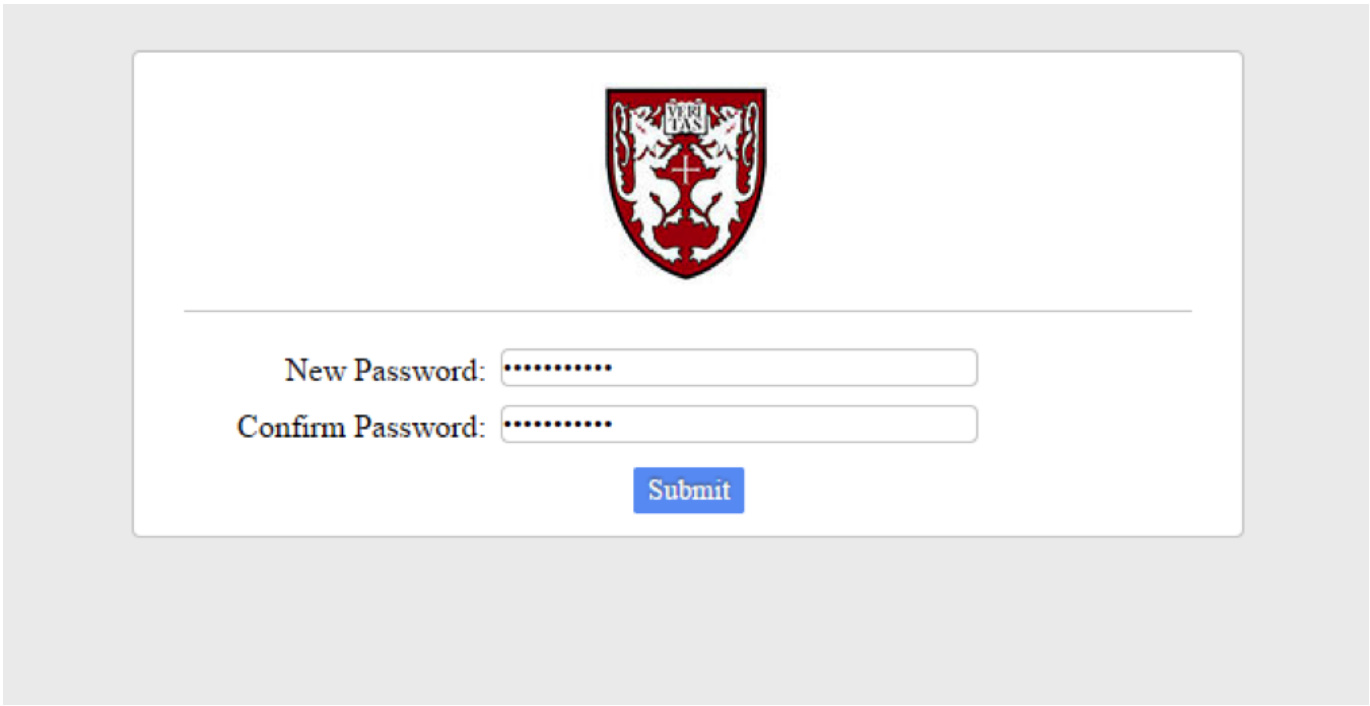
AgentTools 2.0 User Guide

Login authorization:

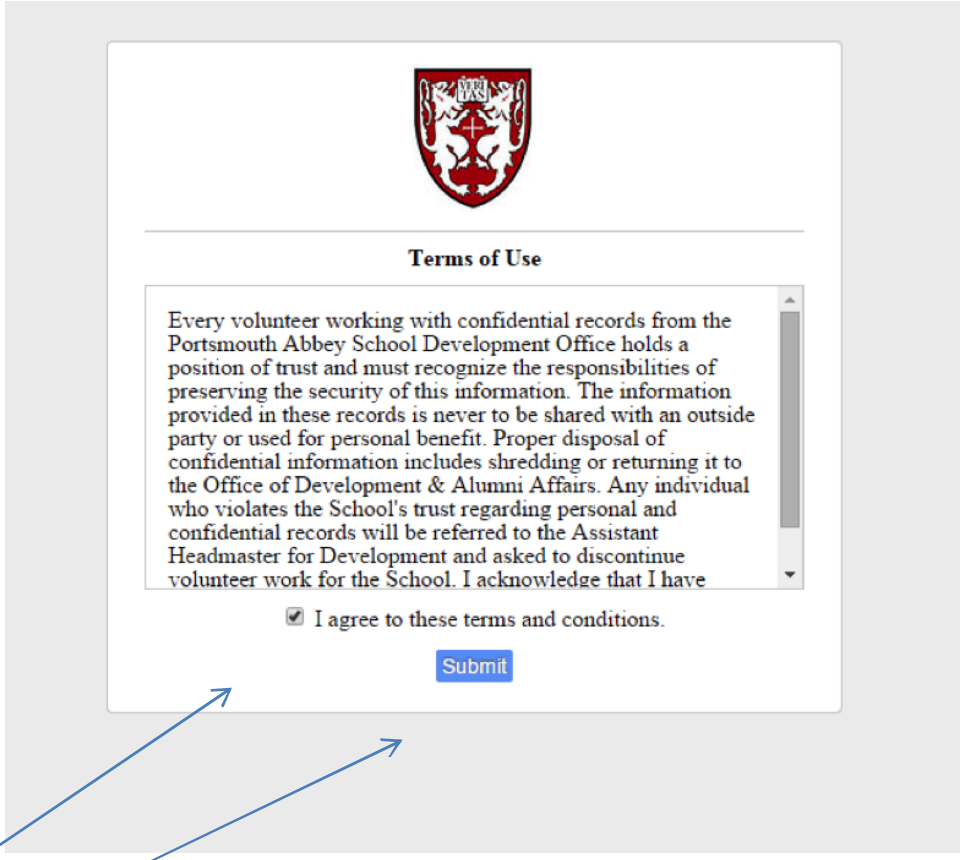
Login Authorization: When a Portsmouth Abbey administrator assigns a user role (such as Class Agent, Decade Chair, Reunion Chair, etc.) to a constituent, the new user receives and email and invitation to set their new pass word.



Clicking the supplied link invokes the dialog box for creation of the user password:

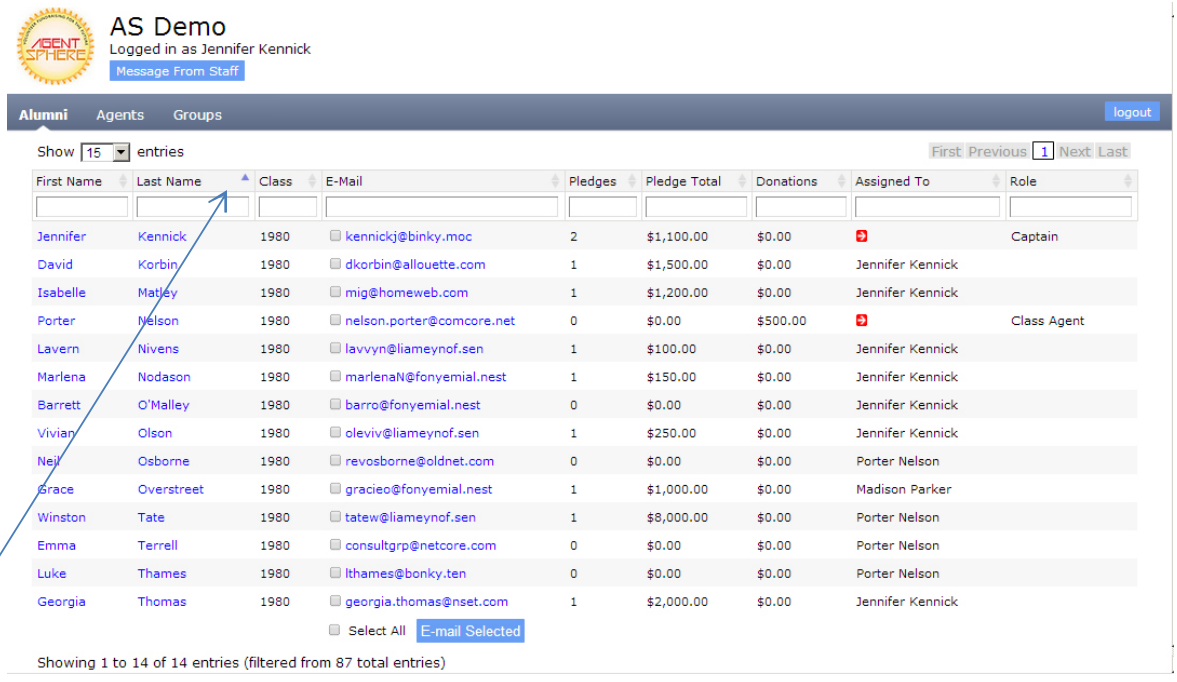


Completing password creation invokes the *terms of use agreement:*



Submission of agreement to the terms of use leads directly to the application landing screen – the Constituents view:

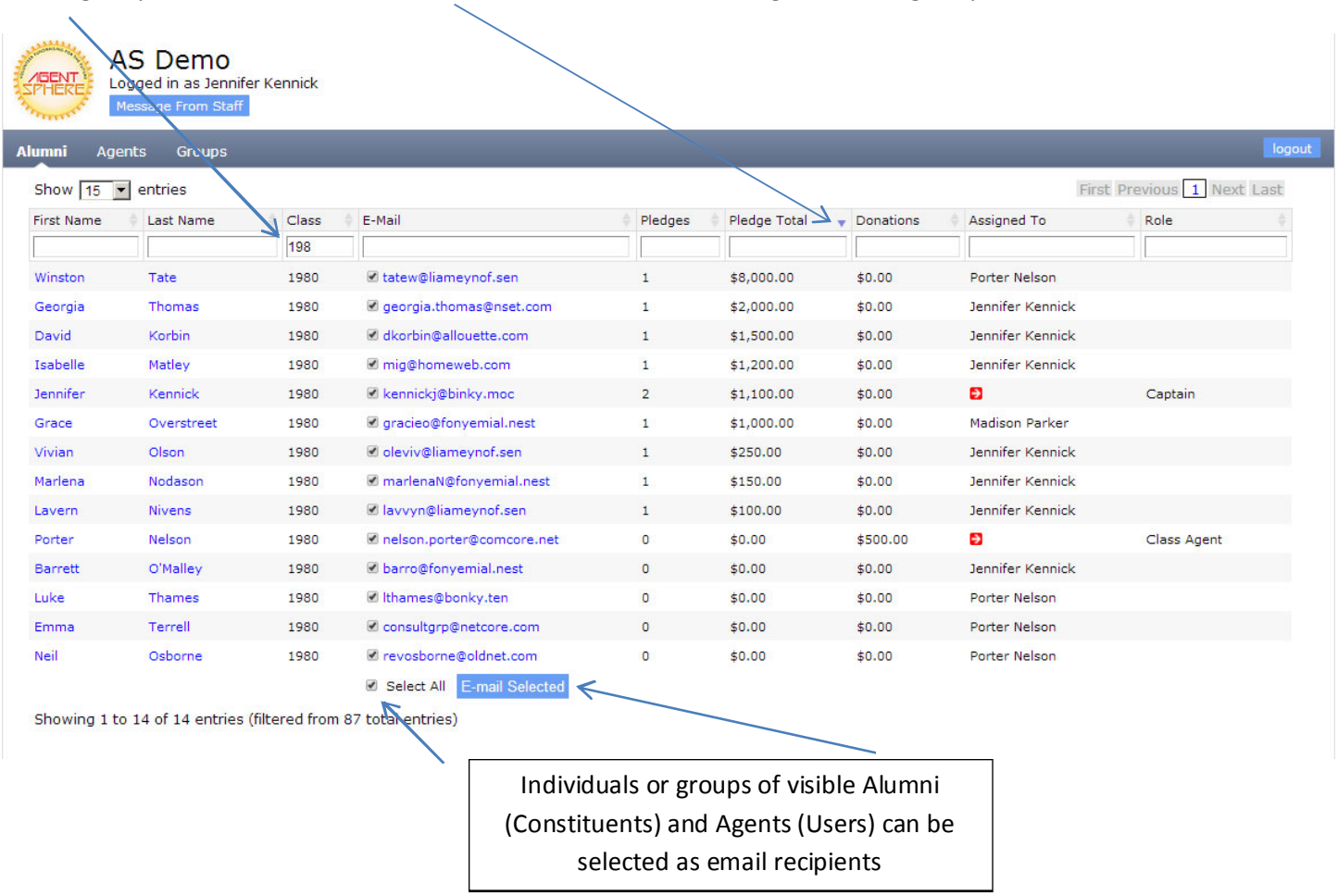
The Constituents Tab, here labeled "Alumni"



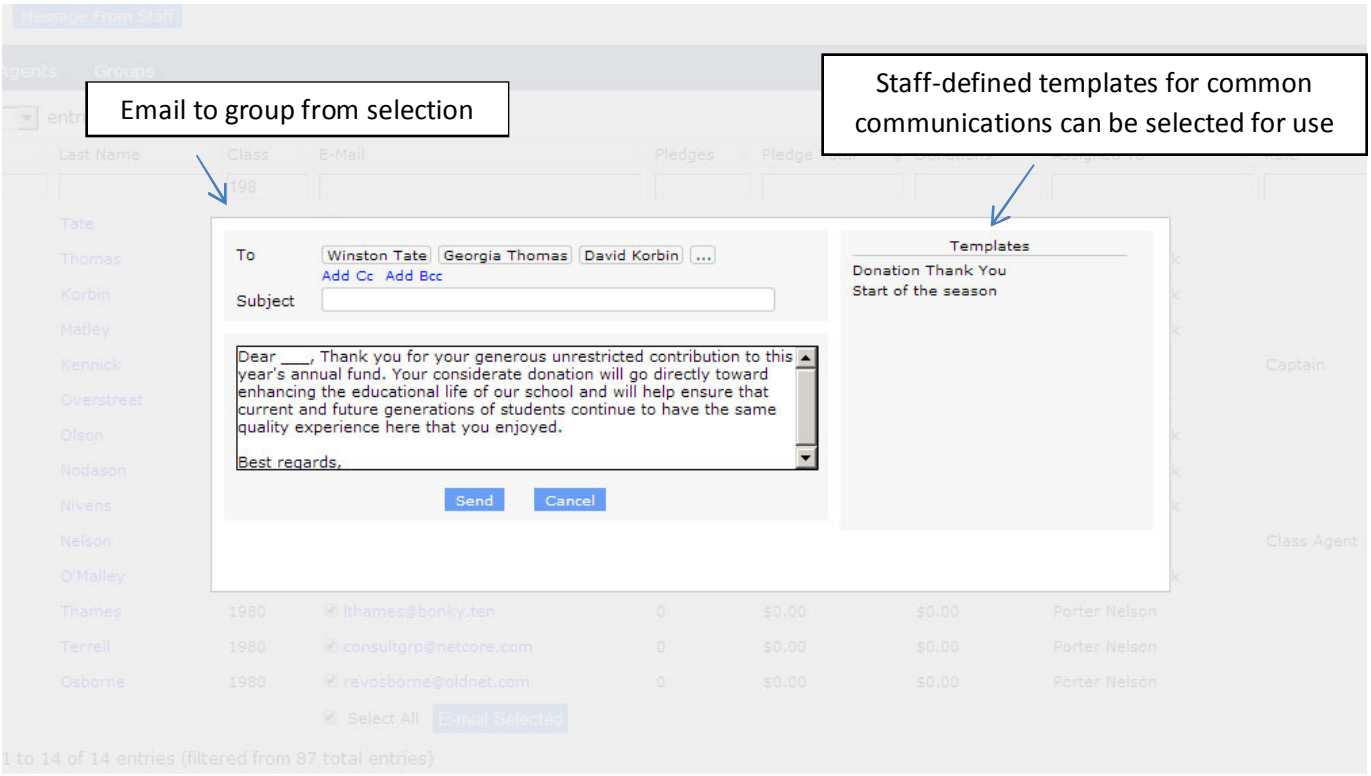
Default *filtering* is alphabetic by last name. The Constituents view is defined and limited by role at setup by school admin.

Using *sort* and *filter* functions allows quick isolation of collections and individual constituents and users.

Filtering is dynamic and columns are sortable– combinations of sorting and filtering are possible:

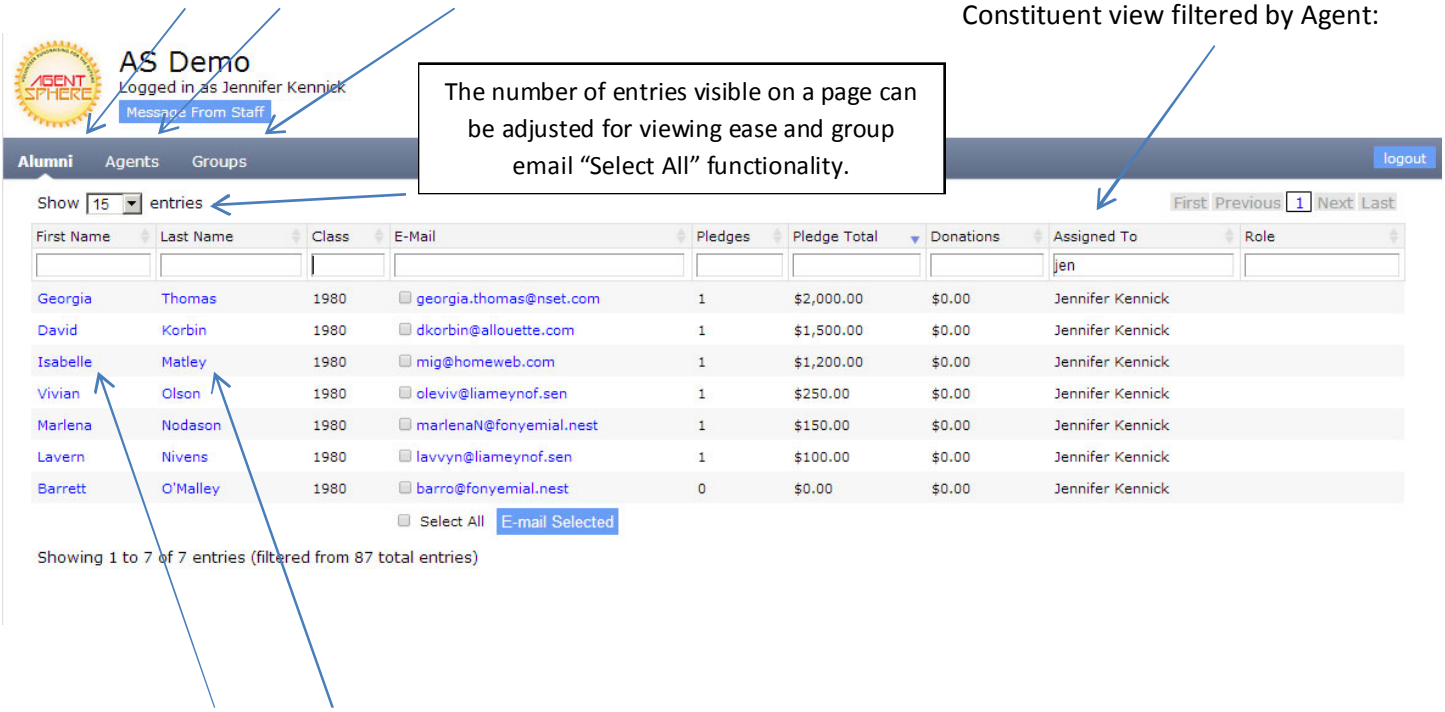


Individuals or groups of visible Alumni (Constituents) and Agents (Users) can be selected as email recipients

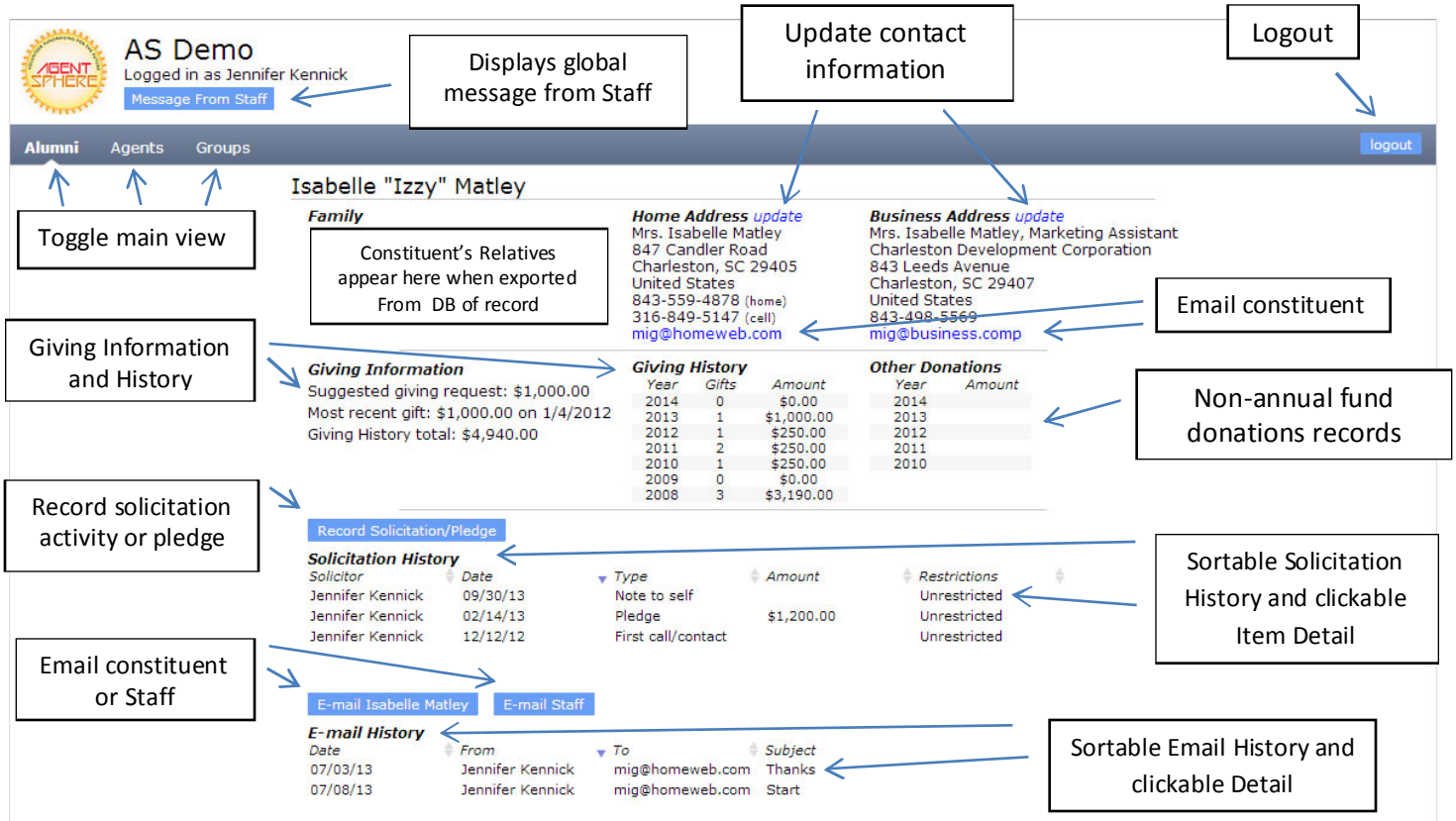


The main navigation tab titles (available by role permissions) are defined by school admin.

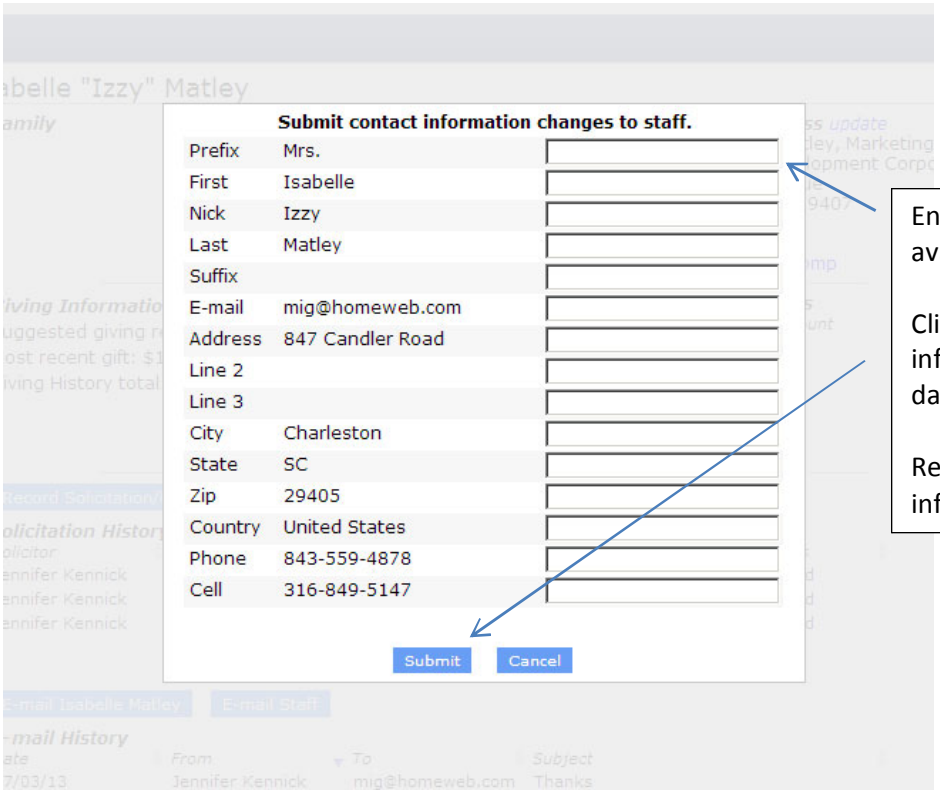
Constituent view filtered by Agent:



Clicking on a constituent's name invokes the constituent detail view:



Updating contact information - reports contact changes to staff:

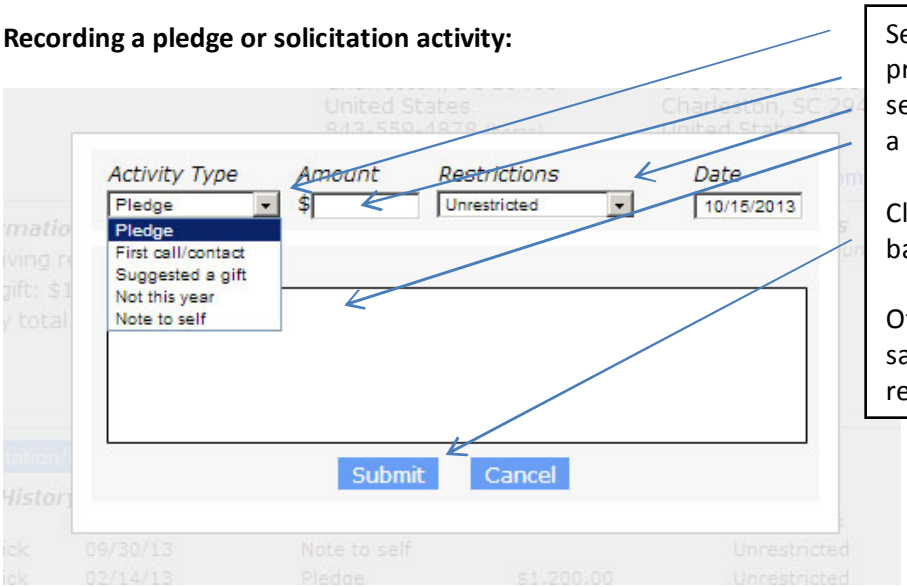


Enter contact information changes into the available fields.

Clicking the Submit button Emails the information to staff for recording in the database of record.

Recorded changes will update contact information in the app with data refresh.

Recording a pledge or solicitation activity:

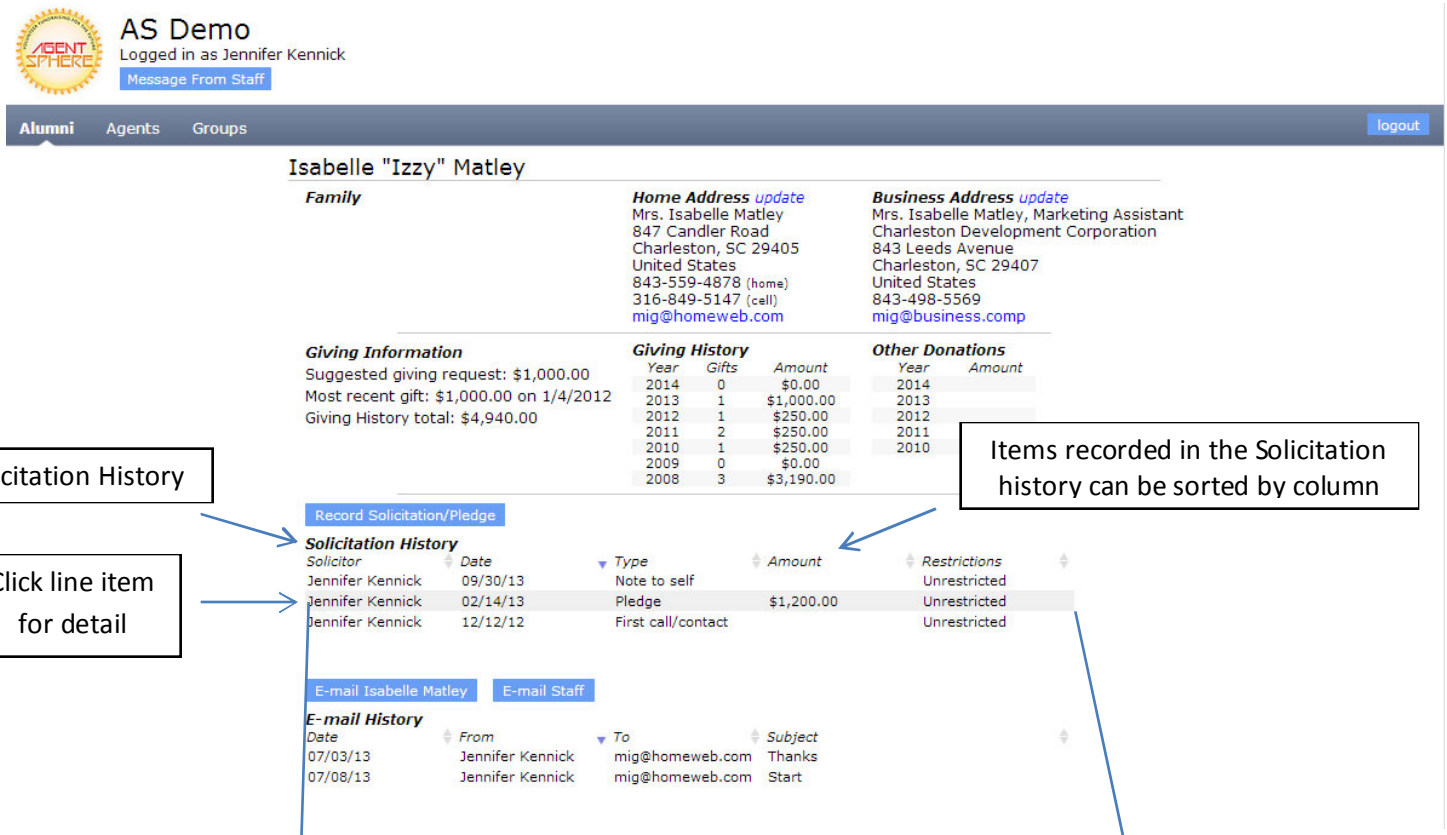


Select the activity from the staff defined presets, for a pledge , enter the amount, select a restriction if applicable, and enter a written note about the activity.

Clicking the Submit button reports pledges back to staff.

Other activities are not reported. All are saved in the solicitation History for future reference.

Pledges and solicitation activity details are recorded in the Solicitation History. Items in the history can be sorted by column and clicked into for detail:



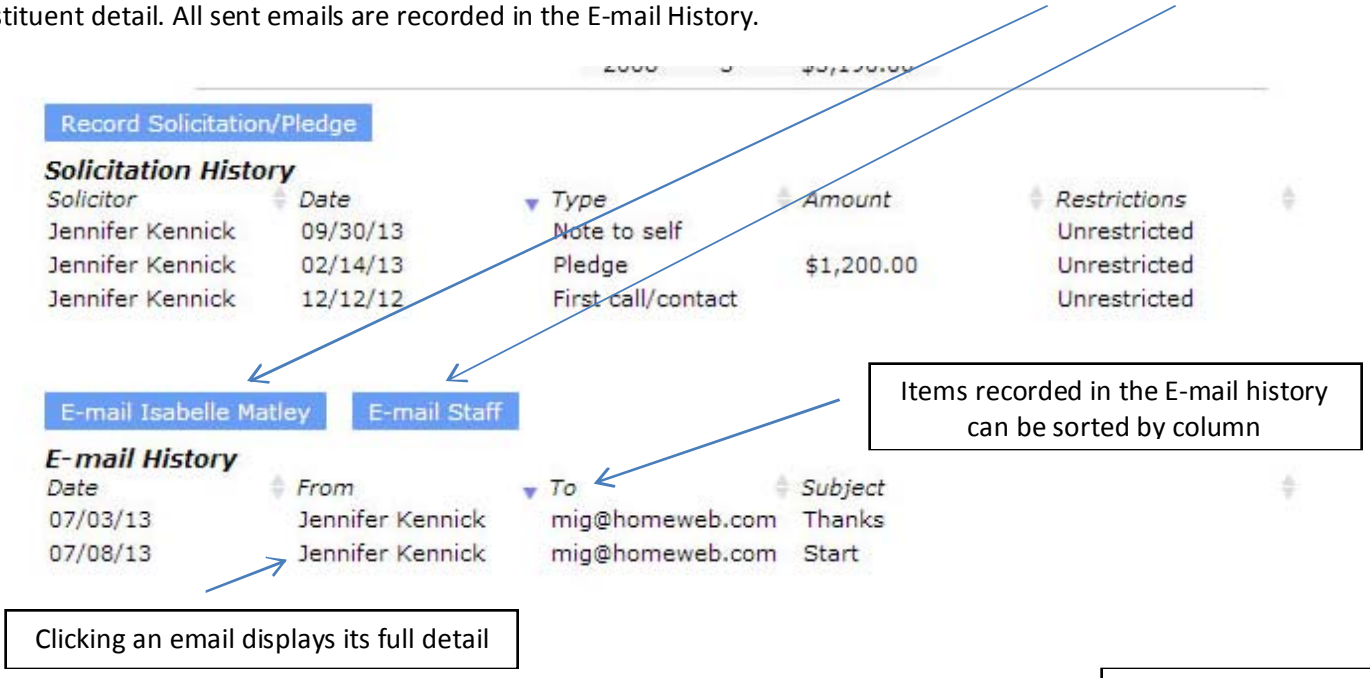
Solicitation History

Click line item for detail

Items recorded in the Solicitation history can be sorted by column

Solicitation History – item detail:

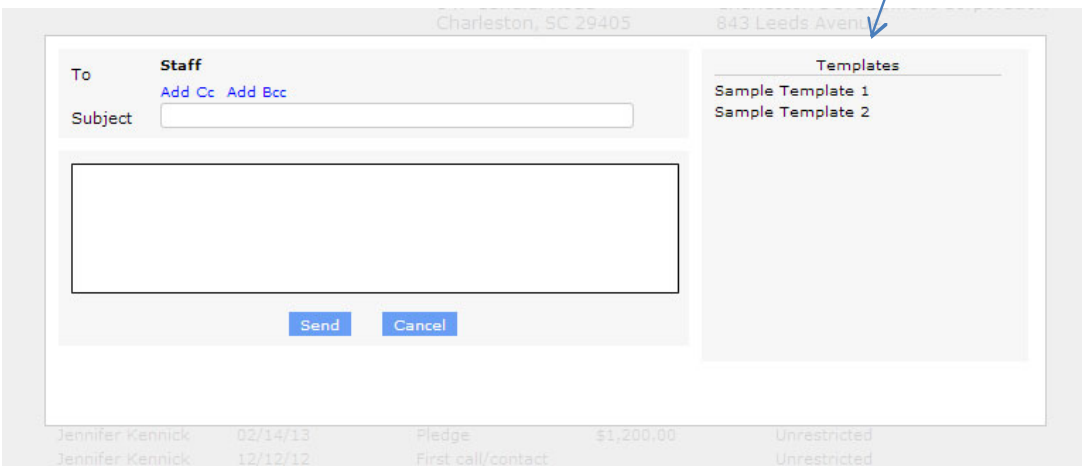
Email addresses, wherever visible, are active and clickable. Email can also be sent to a constituent* or staff* from the constituent detail. All sent emails are recorded in the E-mail History.



*The email constituent dialog box:

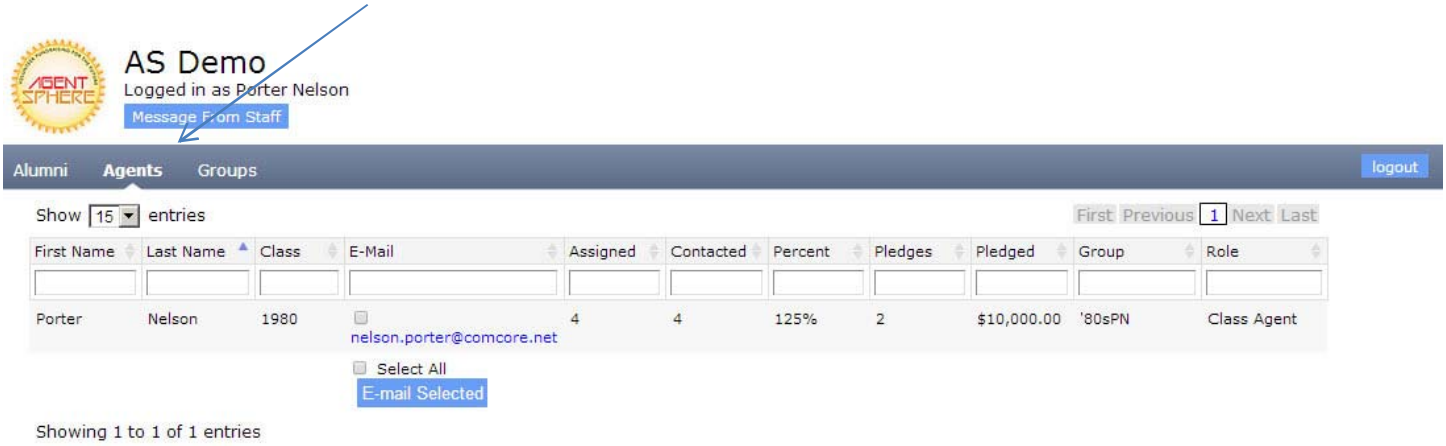
Preset email templates - Click to insert

*The email staff dialog box:

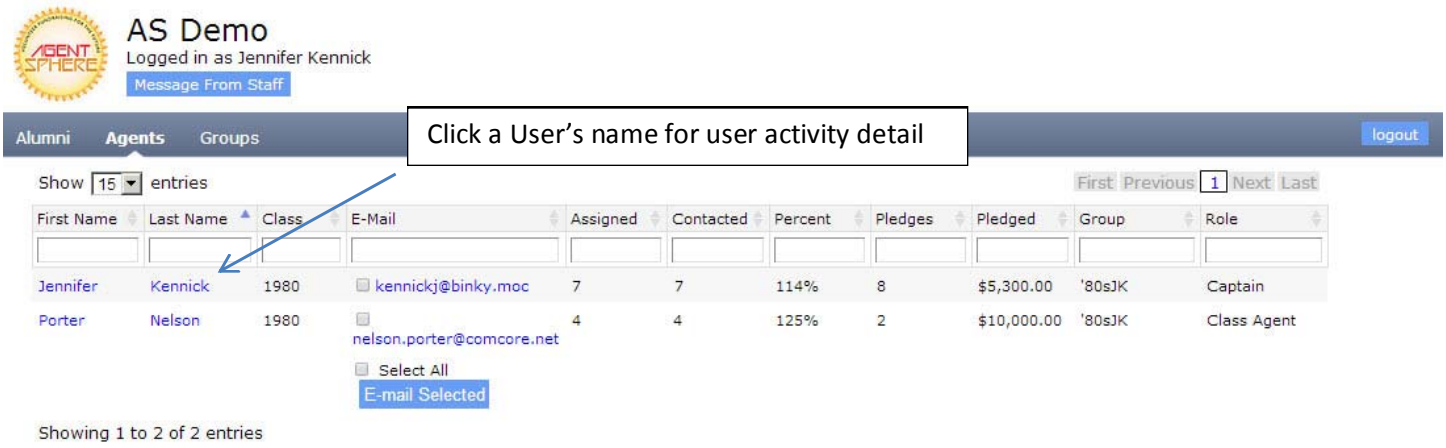


Depending on role permissions, Users may be able to see the Users Tab where performance metrics are presented.

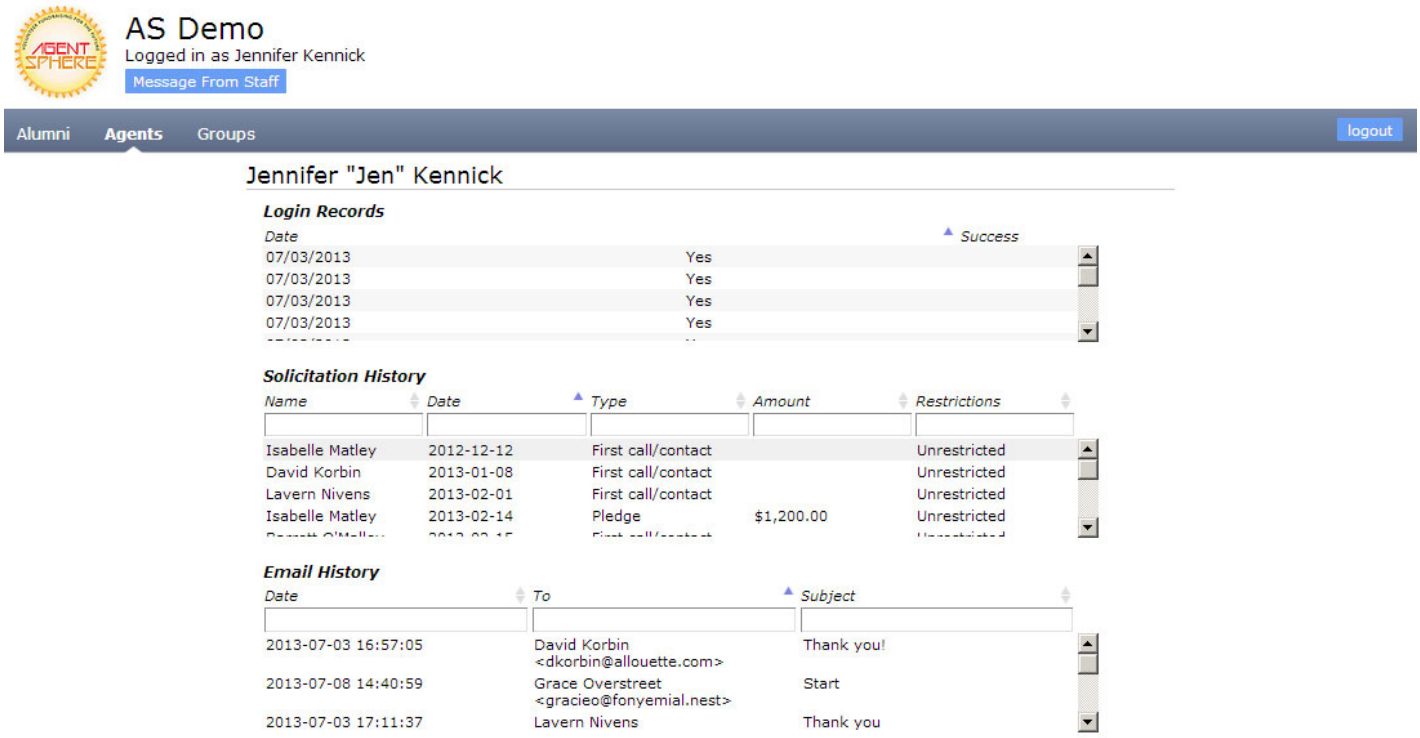
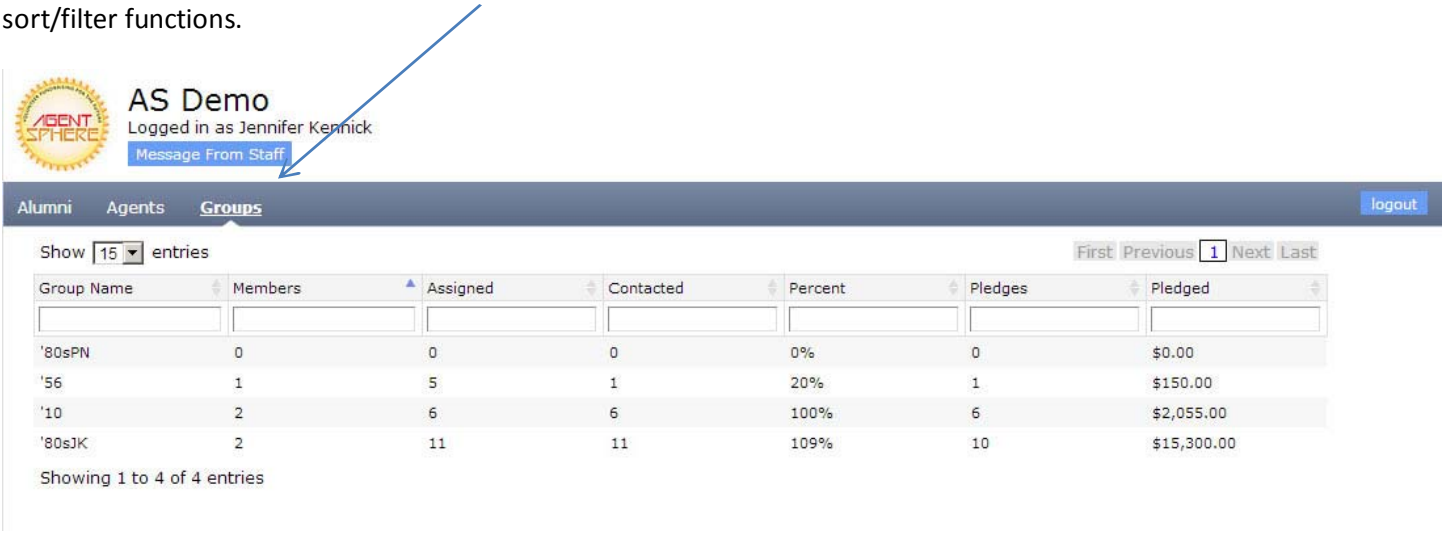
Typical Agent view of the Users Tab (here named Agents) limited to a particular Agent's own metrics:



Typical Decade Chair or Captain's view of the Users tab – multiple Users visible and Users' details available:



The User Detail view includes Login Records, Solicitation History, and Email History with sort and filter functions:



Depending on role permissions, the **Groups** Tab may be available for view with group performance metrics and sort/filter functions.