Your Personal Dashboard

Here you can add multiple widgets for quick views into your database or to use as a task manager. To get started with your first widget, click on "Add Dashboard Widget".

First let's go through some definitions using the "List Widget"

Action Icon Descriptions

Donations, Membership Payments, RSVP's, Check In's, Volunteer Hours - Thes icons you'll typically see come from your donation and membership landing pages as well from your Evergreen pages. You can also create them manually in Alpine.

Email Sent, Opens and Clicks - These icons are tied to a Mailchimp or Constant integration and offer insights into your constituent engagements with your email marketing.

Phone Calls, Text's, Meeting, Letters and Notes - These icons are manually entered action types that can be used for donor outreach touch points. *Contact your Customer Success Manager to enable our Twilio text integration.

Action Status Dropdown

All - Both verified and unverified actions
Verified - Actions imputed today and in the past, ie. a donation made today.
Unverified - Actions tied to a future date, these actions will not count towards any reporting numbers, i.e. a pledge with a due date in the future. Unverified actions are a way to label certain task management features. ie - you called a prospective donor and you want to be reminded to

follow up with them next week.

Time Span Dropdown

Past - Today and any day before today is the **"Past"**.
Upcoming - Any future date.

Sort by Dropdown

Action Date - The day the action took place ie. show me my most recent actions that took place.
Input Date - The day that the action was entered in Alpine i.e., show me my most recent phone calls made.

Who Input

 All - Everyone with a login, or you can select an individual login.

Number of Actions

This will list out the number of actions you'd like in your widget.

Your First Widget

To get started with your first widget, click on **"Add Dashboard Widget"**

List Widget

This widget will allow you to quickly see the activity from anyone of our action types. In the screenshot below you'll see a list widget being used to show the user only the donation action type. This is great to see at a glance who your most recent donors are.

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ADD DASHBOARD WIDGET

All: Verified Donations

ACTION STATUS	TIME SPAN	SORT BY	WHO INPUT	# OF ACTIONS
Verified ⌄	Past ⌄	Action Date ⌄	All ⌄	5

click above to select / deselect filters, ctrl-click (cmd-click Mac) to only select that filter

CONSTITUENT	ACTION	WHO INPUT
Adam Smith	$1,000 Donation Made on Aug 8, 2021 No Notes	Alpine Admin
Jody McCord	$5 Donation Made on Jul 28, 2021 >< >< >< >< >< >< >< >< >< >< >< >< >< >< >< >< Warning: Anything below the above line will be wiped and re-populated every sync Processor: karma Processor Transaction ID: 6452380930 Evergreen Notes: Campaign Donation: 2021 Fundraiser	Evergreen
Jody McCord	$10.61 Donation Made on Jul 22, 2021 >< >< >< >< >< >< >< >< >< >< >< >< >< >< >< >< Warning: Anything below the above line will be wiped and re-populated every sync Evergreen Notes: beer: $10.00 (Tax-Deductible Amount: $10.00) Processing Fee: $0.61 Campaign Donation: 2021 Fundraiser	Evergreen
Jody McCord	$103.30 Donation Made on Jul 9, 2021 >< >< >< >< >< >< >< >< >< >< >< >< >< >< >< >< Warning: Anything below the above line will be wiped and re-populated every sync Evergreen Notes: Donation: $100.00 (Tax-Deductible Amount: $100.00) Processing Fee: $3.30 Campaign Donation: 2021 Fundraiser	Evergreen
Adriana McCord	$100 Donation Made on Jul 6, 2021 No Notes	Alpine Admin

For stewardship purposes, this widget can be used to see who you need to follow up with by using the "phone calls", "meetings", or "notes" action types. In the screenshot below we have this list widget set up to look at our "unverified" and "past" (today or anytime before today) actions. Here we can see who we need to call, or follow up with today.

Once you've made the phone call or addressed the particular action type, besure to click on "unverified" (in blue) to change it to "verified". By setting up a similar list widget and changing the "time span" to "upcoming" you'll be able to see what tasks you have in the future.

All: Unverified Phone Calls + 1 Other

| ACTION STATUS	TIME SPAN	SORT BY	WHO INPUT	# OF ACTIONS
Unverified	Past	Action Date	All	10

click above to select / deselect filters, ctrl-click (cmd-click Mac) to only select that filter

CONSTITUENT	ACTION		WHO INPUT
Jody McCord		Past Note Created on Sep 13, 2021 Follow up	Alpine Admin unverified
Megan Cox		Call Made on Aug 31, 2021 No Notes	Alpine Admin unverified
Pepsi Foundation		Past Note Created on Aug 22, 2021 Need to submit grant	Andrew Kunhardt unverified
The Bank of America		Past Note Created on Jul 6, 2021 Check in on 2022 grant	Andrew Kunhardt unverified
Ford Foundation		Past Note Created on May 31, 2021 Application package is due; requires a mailed in portion	Alpine Admin unverified
Abby West		Call Made on Apr 21, 2021 Check in	Andrew Kunhardt unverified
Ada Beer		Call Made on Apr 21, 2021 Check in	Andrew Kunhardt unverified
Adam Rowe		Call Made on Apr 21, 2021 Check in	Andrew Kunhardt unverified
Blake Nikolaus		Call Made on Apr 21, 2021 Check in	Andrew Kunhardt unverified
Esther Keeling		Call Made on Apr 21, 2021 Check in	Andrew Kunhardt unverified

Chart Widget

This widget is great for all you chart lovers out there. This widget can enable you to see various revenue markers as well as the performance of your touch points. We've set up the chart widget below to show us donation revenue over the past 5 years.

Donation Revenue Over the Past 5 Years

| Donation Revenue ⌄ | Past 5 Years ⌄ | ..ıl | C |

| Year over Year ⌄ | 〜 | .ıl |
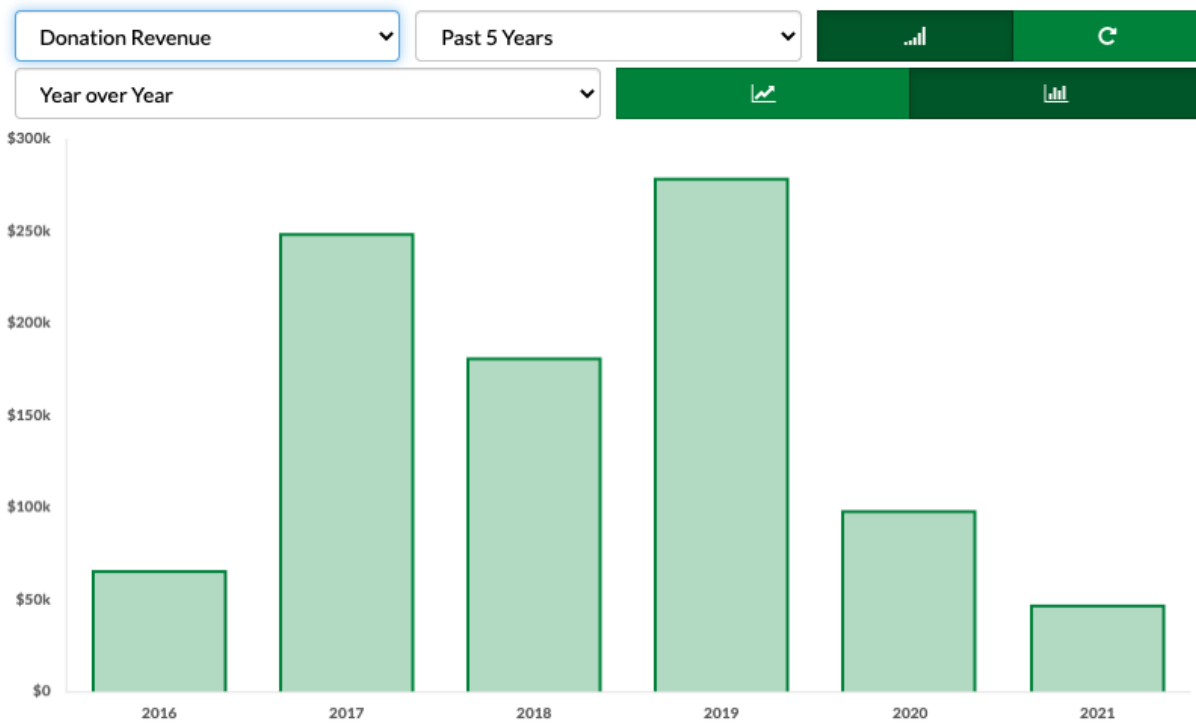
Stats Widget

Our stats widget is great if you're looking for easy to read information outside of traditional charts and graphs. Here we can see a stats widget being use to look at donation revenue from last year. Set up an additional stats widget side by side to see how this year is comparing!

At a Glance

		Past Calendar Year ▾
$98,390 Total Given	**109** Donors	
218 Verified Donations	**15** Unfulfilled Pledges	
$451 Average Donation	**$25,000** Largest Donation	
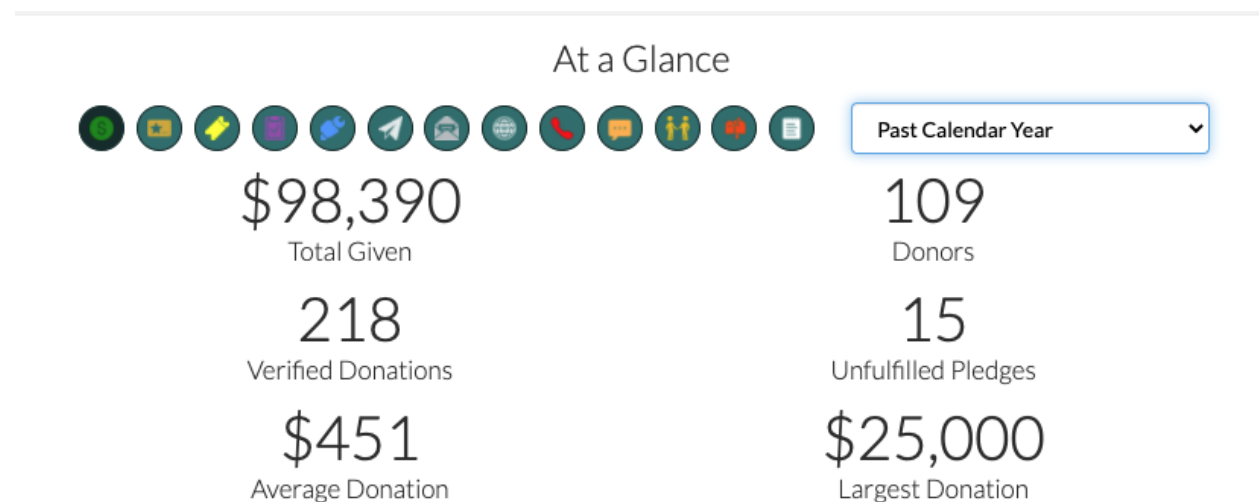
Entity Widget

Looking to track a particular Tag or Campaign? Our entity widget will allow you to see the performance of a particular campaign, or tag segment.

Solicitation Code: Bazaar

| Campaign | ▾ | Solicitation Code: Bazaar | ▾ | This Calendar Year | ▾ |

🟢 $1,134 🟢 67 📷 ⚡ 🗄 🖌 ✉ 🏠 📤 📞 💬 👫 📢 📋
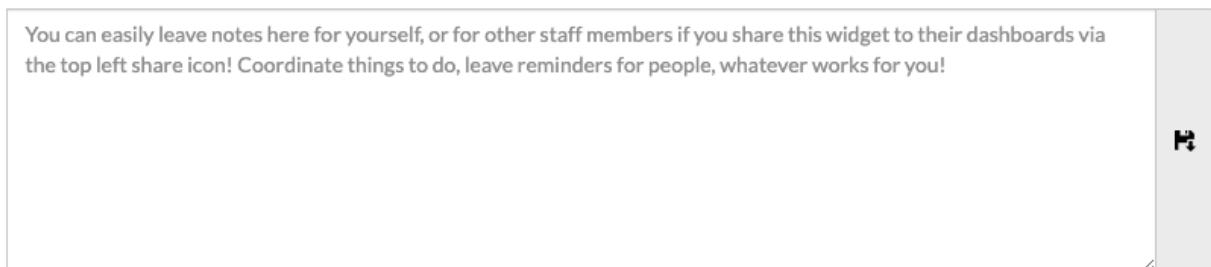
Note Widget

Like the text in the notes widget says, this is for whatever works for you! We like to use it to leave a list of the day's, weeks or months goals. One thing to keep in mind is that this is not meant to be a real time communication tool, like the messenger apps on our phones. If you'd like to pin a note to a colleagues dashboard they will have to refresh their browser to see the new message.

New Note

You can easily leave notes here for yourself, or for other staff members if you share this widget to their dashboards via the top left share icon! Coordinate things to do, leave reminders for people, whatever works for you!

Reports Widget

If you have certain reports that you have to view often, our reports widget is a great way to have all of your favorite reports at your fingertips. First be sure to build and save your report in our constituents reporting interface so that you can use the drop down to add your report to the widget.

Saved Reports

Select Saved Report to Add ⌄

Lapsed Donors Who Open > 30% Of Their Emails *Last Loaded Tue, August 10th 2021 9:52 AM*
Created by: Alpine Admin

View Report ➜

Major Donor Pipeline Example *Last Loaded Thu, June 3rd 2021 11:54 AM*
Created by: Alpine Admin

View Report ➜

First time donors *Last Loaded Mon, June 7th 2021 11:14 AM*
Created by: Alpine Admin

View Report ➜