



RNL SmartView Engagement Center Dashboards

Getting Started Guide

Step 1: Review SmartView Resource Toolkit

Toolkit can be accessed through the Knowledge Center App in the RNL Client Portal

- **Video Training:** Short Video series introducing the Engagement Center Dashboards.
- **Getting Started Guide:** Provides a step by step guide on how to get begin leveraging the Engagement Center dashboards.
- **Data Dictionary:** Glossary that outlines the calculations for and rationale on the importance of each metric.
- **FAQ:** Guide to help answer common questions regarding the SmartView platform.

The screenshot displays the RNL SmartView for Digital Engagement Centers resource toolkit page. At the top, there is a dark blue header with the text "RNL SMARTVIEW FOR DIGITAL ENGAGEMENT CENTERS". Below the header, the page content is organized into several sections. On the left, there is a navigation menu with the following items: "Home - RNL SmartView for Digital Engagement Centers", "RNL SmartView for Digital Engagement Centers", "Phone Channel Dashboard Guide", and "These resources will help you maximize the value of your Digital Engagement Center phone channel results dashboard, available in RNL SmartView." On the right, there is a "Questions about the dashboard?" section with a "Contact Us" button. Below this, there are three "View & Download" buttons for "RNL SmartView Engagement Center Phone Results FAQ", "RNL SmartView Engagement Center Phone Results Metrics Definitions", and "RNL Smartview Engagement Center Phone Results Slide Deck". At the bottom, there is an "Overview Videos" section with two video thumbnails: "RNL DEC SmartView Dashboard - Overview" and "RNL DEC SmartView Dashboard Executive Summary".

[*Access the SmartView Resource Toolkit with this link.*](#)

Step 2: Log into the RNL Client Portal

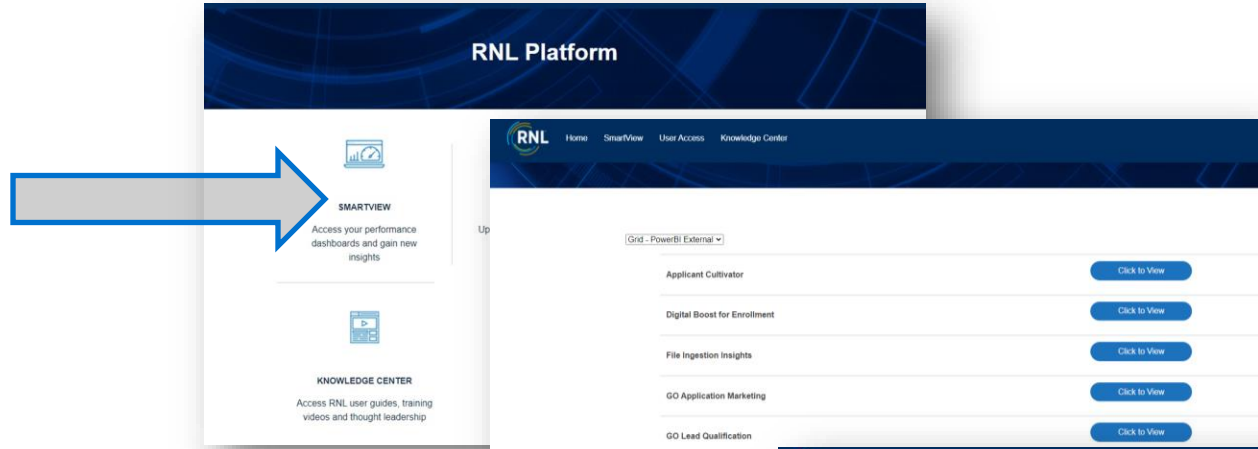
<https://myportal.rnl.com/>



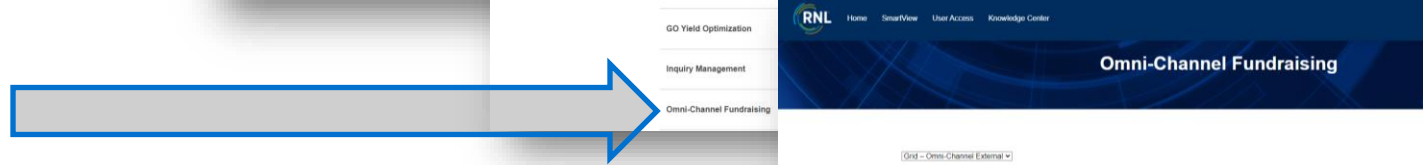
- Use your RNL client portal login to access the RNL Client Portal.
- Reach out to your CSD if you do not currently have access.

Step 3: Access the SmartView App

Click on the SmartView app to access relevant dashboards



Navigate to Omnichannel Fundraising



Click on Engagement Center Phone



Get In Touch & Let's Work Together
[Contact Us Today](#) 800.876.1117

Step 4: Understand the Dashboard Purpose

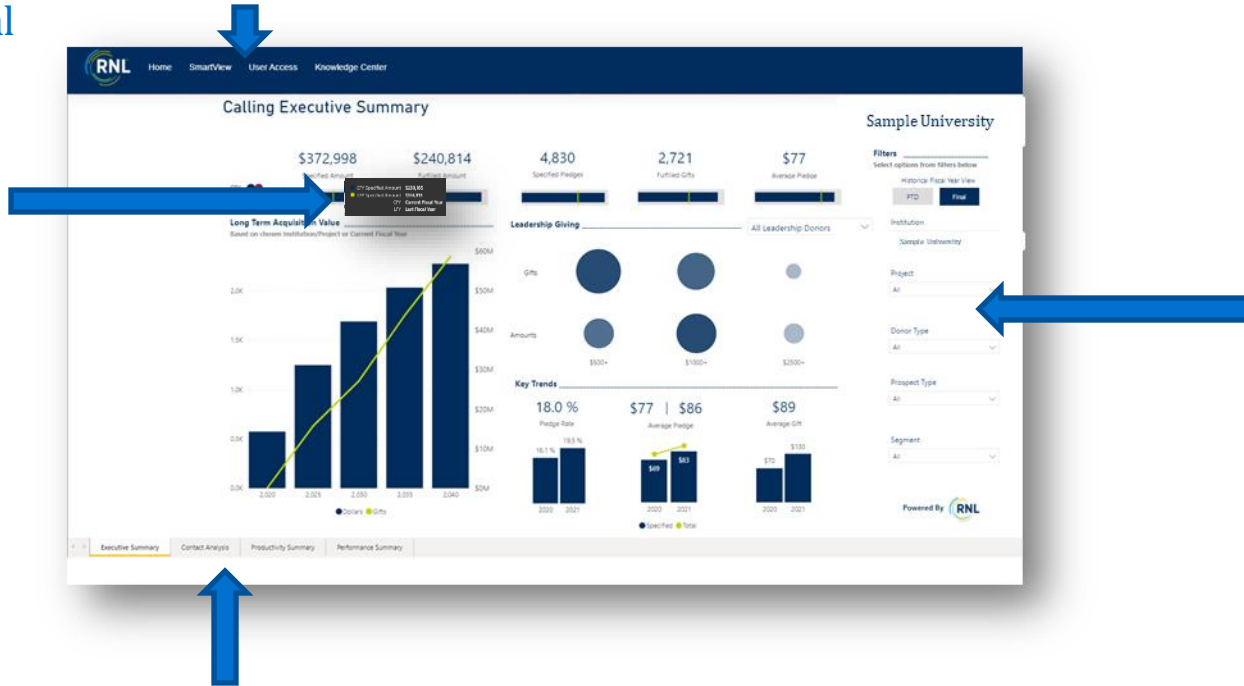
4 Dashboards to Visualize Calling Insights

- **Executive Summary** | High level overview of your calling activity, focusing on fundraising KPI's.
- **Contact Analysis** | Illustrates by prospect & donor type prospect distribution, penetration (completion rate) and phone number quality (contact rate).
- **Productivity Summary** | Primarily used by those using the RNL Engage Platform; it helps the team strategize how to best use the hours and records available to optimize performance.
- **Performance Summary** | Provides deeper insight into project and segment metrics that are drivers of fundraising performance.

Step 5: Explore Dashboard Functionality

Easily navigate to other apps within the portal

Hover over visualizations to see tool tips that provide additional insights



Use filters to drill into your data to better understand performance

Use tabs to toggle between dashboards



Step 6: Help us Improve Your SmartView Experience

Scan this QR code to provide us early feedback on your SmartView experience.



Attend our client Q&A session to engage with our product & client success team and learn more about how to best use your engagement center dashboards.