VAC User Guide:
An Introduction to Fundly Connect™

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Version 1.0

Fundly Connect™ VAC User Guide

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Look for the "✍" symbol for best practices and tips.

Getting Started

Create a Fundly Connect™ Account

In order to connect with non-profit partners and volunteers on Fundly Connect™, VACs must first create an account and purchase a subscription.

1. Go to https://connect.fundly.com.
2. Click **Signup Today**. Then click **Volunteer Action Center**.
3. Under "Create new Account," enter your organization's name or EIN.
4. Under "Basic Info.," enter your organization's EIN and create a username and password, which will become your login for Fundly Connect™.
5. Enter your Organization Details, Address Details, and a Primary Contact. Click **Next**.
6. Review the subscription plans. Click **Select** next to your desired subscription plan**.**
7. Enter your credit card information and billing address.
8. Enter your desired site URL.
   ◆ If your organization desires more customization, Fundly Connect™ also offers a Vanity URL add-on in the Purchase Add-Ons section. A Vanity URL serves as a powerful marketing tool for an organization to promote its brand to partners and volunteers.
9. Under "Order Summary," enter any applicable discount codes.
10. Check the box next to "I would like to pay annually" if you would like to purchase an annual (vs. monthly) subscription.
    Note: Annual subscriptions are offered at a discount.
11. Click and read the **Terms & Conditions**, then check the box to accept them.
    Note: To review the Terms & Conditions in the future, login and click on the **account menu** at the top of the screen, then click **Terms & Conditions**.
12. Click **Register**. You will receive a confirmation email that includes your login details.

Log in to your Fundly Connect™ Account

1. Bookmark your VAC Fundly Connect™ home page created in step 8 of the Create a Fundly Connect™ Account tutorial (i.e., connect.fundly.com/site/sjvolunteers).
   Note: You can also login to your account from the Fundly Connect™ page at https://connect.fundly.com by clicking on **Sign In**.
2. Click on **Organization Login** at the top right of the screen.
3. Enter your username and password, then click **Login**.

Navigate Fundly Connect™

The Dashboard

The Dashboard is the main page and hub of all of your activity on Fundly Connect™. From here, you can review information related to your non-profit partners, opportunities, and volunteers, as well as access other areas of the site.

To access the Dashboard after logging in, click on **your username** at the top of the screen, then click on **Dashboard** in the dropdown menu. Or, if you are already inside the portal, click the **Main Menu**, then click on **Dashboard**.

In the Dashboard, you will see the following:

Active Volunteers
- Number of active volunteers associated with your VAC on Fundly Connect™

Active Teams
- Number of active teams associated with your VAC on Fundly Connect™

Active Nonprofit Organizations
- Number of active nonprofit organizations associated with your VAC on Fundly Connect™

Active Opportunities
- Number of active opportunities your organization has posted on Fundly Connect™

Active Partner Opportunities
- Number of active opportunities your non-profit partners have posted on Fundly Connect™

Organizations Awaiting Approval
- Number of organizations that you must approve before they become associated with your VAC's Fundly Connect™ account

Opportunities Awaiting Approval
- Number of partner opportunities that you must approve before they become active on your VAC's Fundly Connect™ account

Summary of Scheduled Volunteer(s)
- Details about volunteers and their total hours contributed

Dashboard Charts
- Charts detailing information about volunteers, opportunities, hours contributed, etc.

The Main Menu

To access other areas of the Fundly Connect™ site, use the Main Menu. To access it, click the **Main Menu** icon (see Key Guide) at the top right of the screen.

In the Main Menu, you will see the following:

Dashboard
- Return to the Dashboard

Design My Public Site
- Configure your VAC's public Fundly Connect™ site

Configurations
- Personalize your account by setting preferences

Organizations
- View and manage associated organizations

Opportunity Search Widget
- Create and customize widgets that display volunteer opportunities

Donation Widget
- Create and customize donation widgets

Orientations & Trainings
- Add orientation and training requirements to your account

General Settings
- Manage miscellaneous settings in your account

Opportunities
- View your own and your partners' opportunities, including by calendar format

Manage Volunteers
- Add, search for, assign, and schedule volunteers; create or assign volunteer coordinators

Communication Center
- Communicate with organizations and volunteers, view communication history, and create or manage communication templates

Reports
- Create reports from the information in your account

The Quick Menu

The Quick Menu always appears at the top of the screen. It provides quick access to some helpful tools in Fundly Connect™. In the Quick Menu, you will see the following:

Icon	Icon Name	Function
	Search	Search for a volunteer
	Add	Add a volunteer, opportunity, hours, or organization
	Recent Volunteers	See list of volunteers you have recently viewed
	Recent Organizations	See list of organizations you have recently viewed
	Recent Visits	See list of recent pages you have visited in Fundly

Key Guide

The following icons appear throughout Fundly Connect™.
Note: In some cases, the icon image will be a slight variation of the image included in this table.

Icon	Icon Name	Function
	Main Menu	Provides access to other pages in the portal
	Account Menu	View account details, get support, or log out
	Slider	Turns a feature on (green) or off (gray)
	Envelope	Opens email and communication tools
	Copy	Creates a duplicate
	Edit	Opens edit page or window
	Trashcan	Deletes a page or item
	Remove/Close	Removes or closes a page or item
	Add/Open	Adds or opens a page or item
	Return	Returns user to previous page

ⓘ	Information	Provides a description
🔍	Search/View	Conduct a search / View details

Customize your Account

Account Settings

For all account settings, begin in the Dashboard and click the **account menu** at the top of the screen. Then, click **My Account**.

Organization Information

1. Click **Organization Info** on the left of the screen.
2. Edit and add any desired information regarding your organization.
3. When done, click **Save**.

Change your Subscription

A VAC can choose from several subscriptions that each allow a different number of admins, or number of users who can be simultaneously logged in. Increasing or decreasing this number will change your monthly or annual rate.

1. Click **My Account** on the left of the screen.
2. To upgrade your account or change your subscription, click **Change** in the "Current Plan" box.
3. If prompted, add your credit card information and billing address, then click **Update**.
4. Review the subscription plans. Prices differ based on whether you subscribe for plans on a monthly or yearly basis.
5. Click **Monthly** or **Yearly** next to the desired plan to subscribe.

Purchase Add-Ons

VACs have the option to purchase add-ons that offer extra functionality in Fundly Connect™.

1. Click **My Account** on the left of the screen.
2. To add an Add-On to your account, click **Activate** next to the desired feature.
3. If applicable, choose whether you wish to subscribe on a monthly or yearly basis. Click **Purchase**, then click **OK**.
4. To remove an Add-On from your account, click **Deactivate** next to the desired feature.

Edit Credit Card Information

1. Click **My Account** on the left of the screen.
2. Click **Edit** at the top of the screen.

3. Edit your credit card information and/or billing address. Click **Save**.

Generate Account Statement

An account statement provides a summary of your organization's Fundly Connect™ purchases, payments, and credit balance (i.e., refunds) during a designated date range.

👍 Account statements are a useful record when tracking your organization's expenses, submitting grant proposals, etc.

1. Click **My Account** on the left of the screen.
2. Click **Generate Statement** at the bottom right corner of the screen.
3. Select the desired Start and End Dates for the statement.
4. Click **Generate**.
5. Follow your computer's prompts to open and save the statement file.

Change Username or Password

1. Click **Credentials** on the left of the screen.
2. To change username: Enter your new username. Click **Save**.
3. To change password: Enter your old password, new password, and confirm your new password. Click **Save**.

Manage User List

A user refers to each individual login and password in an organization's account. While all subscription types offer the ability to create multiple users, the number of users that can be logged in at the same time is limited to the number of admins allowed by your subscription.

Note: To upgrade your account to allow for additional admins, use the Change your Subscription tutorial above.

1. Click **Users** on the left of the screen.
2. To edit a user: Click **Edit** next to the desired user. Make desired edits, then click **Save**.
3. To add a user: Click **Add User** at the bottom right corner of the screen. Enter the new user's information, then click **Save**. A password will be sent to the email address provided.
4. To delete a user: Click **Delete** in the user's dropdown menu.
5. To reset a user's password: Click **Reset Password** in the user's dropdown menu. A new password will be sent to the user's email address.

Manage Application Roles

When a user is created, it is assigned a role. To restrict users from having access to certain functions or information, a VAC can create and define application roles.

1. Click **Application Roles** on the left of the screen.
2. To add a new application role, click **Add New Role** at the bottom right corner of the screen.
3. Enter a name and description for the new role in the Role and Description fields.

4. For each option listed under the "Accounts" tab, select **Allow** to allow this role access, or **Deny** to deny access.

   ☝ It is recommended that only one user have access to "Account Information" (change organization information, subscription, and credit card information), "User Management" (create and edit users), and "Role Management" (create and define application roles).

5. Click the **Fundly Connect tab** (next to the "Accounts" tab). For each option, select **Allow** to allow this role access, or **Deny** to deny access.
6. When done, click **Save**.
7. To edit an application role created by your VAC, click **Edit**.

My Profile

You may supplement or edit the information provided when you created a Fundly Connect™ account for your organization or users by completing each profile.

Organization Profile

1. From the Dashboard, click the **account menu** at the top of the screen. Then, click **My Profile**.
2. In the **Organization Profile** tab, add or make any desired edits to your organization's name, EIN, website, or address.
3. Edit your organization type, if desired.
4. Edit your organization's email address, if desired. To add an additional email address, click **Add New.**
5. Add or edit your organization's phone number, if desired. To add an additional phone number, click **Add New**.
6. Add or edit a mission statement, if desired.
7. Edit your organization's primary contact, if desired.
8. Edit your organization's causes, if desired.
9. When done, click **Save**.

User Profile

1. From the Dashboard, click the **account menu** at the top of the screen. Then, click **My Profile**.
2. Click the **User Profile** tab.
3. Make any desired edits to the user's name or email address.
4. To add an Email Signature, enter the signature in the text box. If desired, you can use the formatting options available.
5. When done, click **Save**.

General Settings

Connect to CRM Sync

VACs that have both Fundly Connect™ and Fundly CRM™ accounts can choose to sync the information in these accounts. This process will sync information about volunteers and organizations (e.g., name, primary email address, mailing address, primary phone number).

👍 It is recommended that VACs sync these accounts as soon as possible, as it will ensure that all updates made by volunteers to their Fundly Connect™ accounts will also appear in your Fundly CRM™ account.

♦ A Fundly CRM™ account includes tools to track and manage pledges, grants, donors, members, and events. Syncing the two accounts allows your organization to transfer information about your volunteers in Fundly Connect™ into the Fundly CRM™ system, creating a database of potential donors.
   1. From the **Main Menu**, click **General Settings**.
   2. To sync volunteer information from your VAC's Fundly Connect™ account with your Fundly CRM™ account, activate the **Enable Volunteers Sync** slider.
   3. To sync organization information from your VAC's Fundly Connect™ account with your Fundly CRM™ account, activate the **Enable Organizations Sync** slider
   4. Click **Save**.

Connect to "All For Good"

All for Good is an aggregator of volunteer opportunities offered by participating non-profits and describes itself as a "hub for volunteerism and community service on the Internet." You can elect to share your VAC's opportunities on the All For Good site, in addition to the Fundly Connect™ site.

👍 This setting applies only to the opportunities created by you as a VAC, not the opportunities created by your partner organizations. To increase exposure and draw volunteers to their opportunities, encourage your partner organizations to enable their All For Good feeds.
   1. From the **Main Menu**, click **General Settings.**
   2. If you wish for your opportunities to appear on All For Good's site, activate the **Enable Feeds** slider. If not, inactivate the slider.
      Note: You must elect to share either *all* or *none* of the opportunities that your organization posts.
   3. Click **Save**.

Partner Opportunity

   1. From the **Main Menu**, click **General Settings.**
   2. If you wish to review and approve opportunities created by your partner organizations before they are posted on your VAC's public site, activate the **Review Required** slider.
   3. Click **Save**.

Configurations

To customize your VAC's Fundly Connect™ account, you may set and add additional preferences with the Configurations page. If your organization involves activity types, age groups, causes, populations, or skills that are not included in the options provided by Fundly Connect™, you can add them here and they will appear as options when creating an opportunity. Preferences for topics such as agreements, custom datasets, programs, sponsors, notifications, and social sharing are also set here.

Activity Types

"Activity Types" refer to the activities that an organization and its volunteers take part in to support its cause.

1. From the **Main Menu**, click **Configurations**.
2. Click **Activity Types**.
3. To add an activity type: Type its name into the "Name" field, then click **Add**.
4. To edit the name of an activity type: Click **Edit**, type the new name, then click **Save**.
   Note: Only activity types that have been added by the user can be edited or deleted.
5. To delete an activity type: Click **Delete** in its dropdown menu, then click **OK**.

Age Groups Required

"Age Groups Required" refers to the desired age of volunteers working with an organization.

1. From the **Main Menu**, click **Configurations**.
2. Click **Age Groups Required**.
3. To add a new age group: Type its name in the "Name" field, then enter a Start Age and End Age. Click **Add**.
4. To edit an age group: Click **Edit**. Make the desired changes, then click **Save**.
   Note: Only age groups that have been added by the user can be edited or deleted.
5. To delete an age group: Click **Delete** in its dropdown menu, then click **OK**.

Age Groups Served

"Age Groups Served" refers to the age of the individuals whom an organization serves.

1. From the **Main Menu**, click **Configurations.**
2. Click **Age Groups Served**.
3. To add a new age group: Type its name in the "Name" field, then enter a Start Age and End Age. Click **Add**.
4. To edit an age group: Click **Edit**. Make the desired changes, then click **Save**.
   Note: Only age groups that have been added by the user can be edited or deleted.
5. To delete an age group: Click **Delete** in its dropdown menu, then click **OK**.

Agreements

VACs have the option to require volunteers and partner organizations to sign an agreement (e.g., photo release waiver, liability waiver) upon registering or applying to a program.

Note: In the Create a Program tutorial, you can add agreements to individual programs.

1. From the **Main Menu**, click **Configurations**.
2. Click **Agreements**.
3. To create an agreement, at the bottom right corner of the screen click **Add New Agreement**.
4. To inactivate this agreement, set the slider at the top of the screen to **Inactive**.
5. Enter an Agreement Title.
6. If the agreement is for organizations, activate the **Applies to Organization Registration** slider.
7. If the agreement is for volunteers, activate the **Applies to Volunteer Registration** slider.
8. To add a document containing the agreement:
    a. Select the **Upload Agreement** button.
    b. Click on **Click here OR Drop file here**.
    c. Select the desired document from your computer.
9. To manually enter the agreement content:
    a. Select the **Agreement Content** button.
    b. Enter the content of the agreement. If desired, you can use the formatting options available.
10. When done, click **Save**.
11. To edit an agreement: Access your agreements and click **Edit** next to the desired agreement. Follow steps 4-10 above to make edits.
12. To delete an agreement: Access your agreements and click **Delete** in the dropdown menu of the desired agreement.

Custom Datasets

Custom datasets allow VACs to obtain additional information from volunteers and/or partner organizations through the creation of customized fields. While Fundly Connect™ provides basic prefabricated fields such as name, address, and gender, this feature allows your VAC to add custom datasets requesting unique information (e.g., a volunteer's employment history, an organization's employee count). These fields will appear during the sign-up process when a volunteer or organization creates an account with your VAC, or on an application form when a volunteer applies to an opportunity.

👆 If your VAC requires volunteers to fill out an application form, you can use the custom dataset feature to digitally reproduce the form on Fundly Connect™.

1. From the **Main Menu**, click **Configurations.**
2. Click **Custom Datasets**.
3. At the bottom right corner of the screen, click **Add New Dataset**.
4. Enter a Data Set Name and a Description, if desired.
5. If the dataset is specific to a program offered by your VAC, select the desired program(s).
   Note: If you select a program, this dataset will appear to any organization that wants to link to that program under your VAC.

6. If the dataset is applicable to volunteers or organizations signing up with your VAC, select **Volunteer** or **Organization**.
Note: If you select one of these options, this dataset will automatically appear when a volunteer or organization signs up for an account under your VAC.
7. If the dataset is applicable to volunteers applying to an opportunity, select **Opportunity**.
Note: This dataset will not automatically appear when a volunteer applies for an opportunity, but will be available when designing application forms for opportunities.
8. Click **Save**. Additional fields will appear.
9. To add a new field to this dataset, enter a Field name.
10. Select a Field Type. The descriptions below explain what each field type allows the user to do.
    a. **Text**: Provide short text answers (one line)
    b. **Multiline Text**: Provide long text answers (multiple lines)
    c. **Number**: Enter numbers only
    d. **Yes or No**: Select from "Yes" and "No" radio buttons
    e. **Phone**: Enter phone number
    f. **Email**: Enter email address
    g. **Url**: Enter url
    h. **Date**: Select date from a calendar
    i. **Date & Time**: Select date and time from a calendar
    j. **Dropdown (single choice)**: Select one of multiple choices in a dropdown format
    k. **Radio Button (single choice)**: Select one of multiple choices in a radio button format
    l. **Checkbox (multiple choice)**: Select multiple choices by checking boxes
    m. **Picture**: Upload a picture from computer
    n. **Document**: Upload a document from computer
11. The Dropdown, Radio Button, and Checkbox field types require that you provide additional options for the user to choose from. To add an option, enter your text in the Options field and click the **add icon**. Click the **add icon** to add another option. Click the **remove icon** to remove an option.
12. Select whether the field is **Required** and/or for **Staff Use Only**, if applicable.
Note: Any fields marked as "Staff Use Only" will not be visible to volunteers or organizations.
13. Click **Save Field**.
14. To edit a field you added, click **Edit** next to the desired field.
Note: You may only edit the field name and Required/Staff Use Only options.
15. Continue adding fields until your dataset is complete.
16. Click the up and down arrows to the left of each field name to arrange the order of the fields.
17. When done, click **Save**.
18. To edit a custom dataset: Access your custom datasets and click **Edit** next to the desired dataset. Follow steps 4-17 above to make edits.

19. To delete a custom dataset: Access your custom datasets and click **Delete** in the dropdown menu of the desired dataset, then click **OK**.

Causes

"Causes" refer to the causes that define the mission of an organization.
   1. From the **Main Menu**, click **Configurations**.
   2. Click **Causes**.
   3. To add a cause: Type its name in the "Name" field, then click **Add**.
   4. To edit the name of a cause: Click **Edit**, type the new name, then click **Save.**
      Note: Only causes that have been added by the user can be edited or deleted.
   5. To delete a cause: Click **Delete** in its dropdown menu, then click **OK**.

Populations Served

"Populations Served" refers to categories that classify the population that an organization serves.

   1. From the **Main Menu**, click **Configurations.**
   2. Click **Populations Served**.
   3. To add a new population: Type its name in the "Name" field, then click **Add**.
   4. To edit a population's name: Click **Edit**. Make the desired change, then click **Save**.
      Note: Only populations that have been added by the user can be edited or deleted.
   5. To delete a population: Click **Delete** in its dropdown menu, then click **OK**.

Programs

See the "Create a Program" section of the Create and Manage Programs tutorial.

Program Level Security

See the "Program Level Security" section of the Create and Manage Programs tutorial.

Skills

"Skills" refer to the skills that an organization and its volunteers utilize to conduct its activities and support its cause.

   1. From the **Main Menu**, click **Configurations**.
   2. Click **Skills**. A list of "parent" and "child" (i.e., sub-) skills will appear.
      Note: Only skills that have been added by the user can be edited or deleted.
   3. To add a skill:
      a. To add a parent skill: Click **Add New Skill** in the bottom right corner of the screen. Type the new skill name in the "Parent Skill" field, then click **Save**.
      b. To add a child skill to this parent category: Type the child skill name in the "Skill" field under "Child Skill," then click **Add**.
   4. To edit a skill, click **Edit** and the Add/Edit window will open.
      a. To edit the parent skill's name: Type the new name, then click **Save**.
      b. To edit a child skill's name in this parent category: Click **Edit**. Type the new name, then click **Save**.

5. To delete a skill:
    a. To delete an entire parent category: Click **Delete** in the dropdown menu, then click **OK**.
    b. To delete a child skill: Click **Edit** next to the parent category. Next to the child skill you wish to delete, click **Delete** in its dropdown menu, then click **OK**.

Sponsors

Fundly Connect™ allows VACs to add sponsors (i.e., individuals or organizations that donate funds to help run projects, programs, or events) to their accounts. This feature is helpful for tracking and organizing sponsors internally. You also have the option to recognize sponsors by displaying them on your public site.

Note: In the Create a Program tutorial, you can link sponsors to programs to which they are connected.

1. From the **Main Menu**, click **Configurations.**
2. Click **Sponsors**.
3. To add a sponsor, click **Add New Sponsor** at the bottom right corner of the screen.
4. Enter a Name for the sponsor.
5. Enter the sponsor's Website.
6. Select a Category for the sponsor (e.g., event sponsor, program sponsor, corporation, government agency). Categories will vary according to a VAC's preferences and needs.
   Note: To create a new Category, type its name and press **Enter** on your keyboard.
7. Select a Level for the sponsor (e.g., Bronze, Gold, $50, $1000+).
   Note: To create a new Level, type its name and press **Enter** on your keyboard.
8. If you wish to display this sponsor on your public site, activate the **Display on public site** slider.

   👍 Displaying a sponsor on your public site is a great way to recognize their contribution. Sponsor logos appear at the bottom of your public site. If you choose to display a sponsor, be sure to add their website URL (step 5); this allows users to access the sponsor's website by clicking on its logo (step 9).
9. To add an image of the sponsor's Logo, click on **Click here OR Drop file here**. Select the desired document from your computer.
10. If you are done, click **Save**. If you would like to add another sponsor, click **Save And Add New** and repeat the above process.
11. When done, you may click **Back** to return to the main sponsors page.
12. To edit a sponsor: Click **Edit**. Make the desired edits, then click **Save**.
13. To delete a sponsor: Click **Delete** in the dropdown menu, then click **OK**.
    Note: If a sponsor is currently inactive but may become active again in the future, consider removing them from your public site (step 8) instead of deleting them.

Volunteer Signup

VACs are able to customize the information a volunteer is able or required to provide when signing up.

1. From the **Main Menu**, click **Configurations.**
2. Click **Volunteer Signup**.
3. Next to each item, choose whether to activate or inactivate the slider.
Note: Items with "Make...required [on signup]" require the volunteer to provide the indicated information, whereas items with "Display..." give the volunteer the option to provide the indicated information by providing a field for it.
4. If desired, enter a Signup Message to be displayed to the volunteer.
5. When done, click **Save**.

Team Signup

VACs are able to customize the information a team is able or required to provide when signing up.

1. From the **Main Menu**, click **Configurations.**
2. Click **Team Signup**.
3. Next to each item, choose whether to activate or inactivate the slider.
4. If desired, enter a Signup Message to be displayed to the team.
5. When done, click **Save**.

Email Notifications

Fundly Connect™ sends automated email notifications when certain actions occur in association with your account. Some notifications are sent to volunteers or partner organizations, and some notifications are sent to your own organization. You can edit and inactivate these notifications.

1. From the **Main Menu**, click **Configurations.**
2. Click **Email Notifications**.
3. The "Title" column lists the type of email notification (i.e., the event that prompts an email notification). To edit an email notification, click the **Edit** button.
4. If desired, edit the Sender Email, Sender Name, and Subject fields.
Note: The Sender Email defaults to the email address associated with your organization or current user's account. Editing the Sender Email address will affect where you receive any replies.
5. To inactivate this email notification, uncheck the **Active** box.
Note: Do not inactivate email notifications that contain critical information that cannot be accessed elsewhere (e.g., changed password).
6. To add an email address as a recipient of this notification each time it is sent, check the **Additional Info** box. Enter a Receiver Email and/or CC Address associated with your organization. If entering multiple email addresses, separate them with a comma and a space.

   👍 For notifications sent to your own organization, use this feature when you wish to receive the notification at an additional email address. For notifications sent to volunteers or partner organizations, use this feature when you wish to track certain processes (e.g., changed passwords).

7. To edit the content of the email notification message, make any desired changes in the "Contents" box. If desired, you can use the formatting options available.
Note: Editing text that appears between placeholder brackets "{ }" may invalidate the placeholder.
8. If you wish, you can add placeholders to the body of the notification. Use placeholders to auto-populate the text with information (e.g., Opportunity Name, Scheduled Date) specific to each recipient or opportunity.
    a. To add a placeholder to the body of the notification, place your cursor at the location in the contents box where you want the placeholder to be added.
    b. Select the desired placeholder from the "Placeholder" dropdown menu, then click the **add icon**.
    c. Repeat for each additional placeholder.
9. When done, click **Save**.
10. To undo changes made to a notification, return to the list of email notifications and click **Restore Default** in the desired dropdown menu, then click **OK**.

Notification Settings

To remind volunteers and opportunity owners of an upcoming opportunity for which they are scheduled or hosting, your organization can set up to three reminder notifications. You can also set up automated thank you letters.

Note: Notification settings only apply to your VAC's own opportunities and volunteers, not to those of your partner organizations.

1. From the **Main Menu**, click **Configurations**.
2. Click **Notification Settings**.
3. Under "Reminder Notification," you can customize notifications designed to remind volunteers and opportunity owners of upcoming opportunities.
    a. To set when a reminder notification is sent, enter a number in the "Days Before Volunteering Date" box. If you enter a "7", for example, a notification will be sent 7 days before the date of the opportunity.
    b. To set who will receive notifications, select **Volunteer** and/or **Opportunity Owner**.
    c. To disable a reminder notification, check **NA**.
    d. To set a second reminder notification, repeat the steps above in the additional "Days Before Volunteering Date" box provided.
    e. To set a reminder notification to be sent on the day an opportunity occurs, complete the "On Volunteering Day" box.
4. Under "Automated Thank You Letter Settings," you can set up automated thank you letters.
    a. To set when a thank you letter is sent, enter a number in the "Days After Volunteering Date" box.
    b. Check the **Volunteer** box.
    c. To disable thank you letter notifications, check **NA**.
5. To disable all notifications, set the slider at the top of the screen to **Disable**.

6. When done, click **Save**.

From this page, you can also edit the written content of the notifications sent to volunteers. Changes made during this process will apply to all notifications.

1. To edit the content of the opportunity reminder notification, click the **Volunteering Day Email** link at the top of the screen. A new webpage will open.
2. If desired, edit the Sender Email, Sender Name, and Subject fields.
   Note: The Sender Email should be one that is associated with your organization. This will enable you to receive all replies.
3. To inactivate all reminder notifications, uncheck the **Active** box.
4. To add an email address as a recipient of this notification each time it is sent, check the **Additional Info** box. Enter a Receiver Email and/or CC Address associated with your organization.
   Note: This feature is not recommended due to the volume of reminder notifications sent.
5. To edit the content of the message, make any desired changes in the "Contents" box. If desired, you can use the formatting options available.
   Note: Editing text that appears between placeholder brackets "{ }" may invalidate the placeholder.
6. If you wish, you can add placeholders to the body of the notification. Use placeholders to auto-populate the text with information (e.g., Opportunity Name, Scheduled Date) specific to each recipient or opportunity.
   a. To add a placeholder to the body of the notification, place your cursor at the location in the contents box where you want the placeholder to be added.
   b. Select the desired placeholder from the "Placeholder" dropdown menu, then click the **add icon**.
   c. Repeat for each additional placeholder.
7. When done, click **Save**.
8. To edit the content of the thank you letter notification, click the **Automated Thank You Email** link at the top of the screen. A new webpage will open. Follow the same steps as above.

Social Sharing

Your organization and its volunteers have the option to share content on personal social media accounts when an opportunity is published or applied for. You can customize the default message that appears when this content is shared, but note that organizations and volunteers have the ability to further edit these message at the time of posting. Content will only be shared if organizations or volunteers choose to do so.

1. From the **Main Menu**, click **Configurations**.
2. Click **Social Sharing**.
3. In the "Message when publishing opportunity field," add the message you would like to appear when your organization shares that it published an opportunity on Fundly Connect™. When done, click **Save**.

4. In the "Message when volunteer applies to an opportunity" field, add the message you would like to appear when volunteers share that they applied to an opportunity on Fundly Connect™. When done, click **Save**.

Organization Types

When an organization creates an account or edits its profile, it can select what type of organization it identifies as. You can add custom organization types below.

1. From the **Main Menu**, click **Configurations**.
2. Click **Organization Types**.
3. To add an organization type: Type its name in the "Name" field, then click **Add**.
4. To edit an organization type: Click **Edit**. Make the desired change, then click **Save**.
   Note: Only organization types that have been added by the user can be edited or deleted.
5. To delete an organization type: Click **Delete** in its dropdown menu, then click **OK**.

Tags

A tag is a flag that can be assigned to individual volunteers. This flag can then be used to quickly identify a specific group of volunteers when conducting a search or creating a report. Tags are created here in your configurations and can be assigned to volunteers by following the Assign Tags to Volunteers tutorial.

1. From the **Main Menu**, click **Configurations**.
2. Click **Tags**.
3. To add a tag: Type its name in the "Name" field, then click **Add**.

   👍 A VAC that does not have a CRM account may use a "Staff" tag, for example.
4. To edit a tag: Click **Edit**. Make the desired change, then click **Save**.
5. To delete a tag: Click **Delete** in its dropdown menu, then click **OK**.

Featured Opportunities

You can select individual opportunities or specific types of opportunities to feature on your public site. To configure your site to either display or hide featured opportunities, follow the Edit Public Site Content section of the Manage your Public Site tutorial.

Note: If you do not designate any featured opportunities, they will be randomly selected and listed alphabetically.

1. From the **Main Menu**, click **Configurations**.
2. Click **Featured Opportunities**.
3. To set featured opportunities by their search criteria (i.e., opportunity details): Set the slider to **Search Criteria**.
   Note: If you wish to select specific opportunities to feature instead, skip to step 4.

   👍 You can use this feature to highlight opportunities that are especially current or significant, such as those reflecting upcoming holidays and commemorations (e.g., Earth Day, Breast Cancer Awareness month) or those linked to an upcoming program or event.

      a. Select the Organization(s) and Program(s) whose opportunities you wish to feature.

      b. Under "What Would You Like To Do?," select the Cause(s), Skill(s), and Activity Type(s) you wish to feature.

      c. Under "Appropriate For," select the Age range(s) you wish to feature. To feature opportunities that allow Team/Group Applications, check the box.

      d. Under "Who Would You Like To Serve?," select the Age range(s), Gender, and Population(s) Served you wish to feature.

      e. If you wish to delete your work and reset all fields, click **Clear Search Criteria**.

      f. When done, click **Save**.

4. To select featured opportunities manually: Set the slider to **Selection**.
   Note: You must set the slider to display featured opportunities by either "Search Criteria" or "Selection." You may not display both.

      a. Click **Select Opportunities**.

      b. In the "Select Featured Opportunities" window, check the boxes next to the opportunities you wish to feature.

      c. When done, click **Select & Close**.

      d. To delete an opportunity from the featured list, click **Delete**.

      e. When done, click **Save**.

Preferred Locations

An organization can save preferred locations. These are locations that you usually use when creating opportunities. This will allow you to select from any of the configured preferred locations so you won't have to manually enter them every time.

1. From the **Main Menu**, click **Configurations**.
2. Click **Preferred Locations**.
3. To add a preferred location: Click on **Add Location**. Enter a Title and the exact address, then click **Save**.
4. To edit a preferred location: Click **Edit**. Make the desired change, then click **Save**.
5. To delete a preferred location: Click **Delete** in its dropdown menu, then click **OK**.

Time Off

When you or your volunteers schedule a time off, you'll have to select the type of time off you're scheduling. You can add custom time off types below.

1. From the **Main Menu**, click **Configurations**.
2. Click **Time Off**.
3. To add a time off type: Type its name (e.g., "On Hold") in the "Name" field, then click **Add**.
4. To edit a time off type: Click **Edit**. Make the desired change, then click **Save**.
5. To delete a time off type: Click **Delete** in its dropdown menu, then click **OK.**

Manage your Public Site

As a VAC, you are able to design and customize a public site in Fundly Connect™ to represent your organization. Your public site is where volunteers and organizations will initially create an account with your VAC and where they can return to perform tasks such as searching for opportunities, viewing opportunity calendars, making donations, and accessing your VAC's social media accounts.

👍 While Fundly Connect™ provides a template for your public site that includes suggestions for pages and content, it does not contain any information specific to your organization. Be sure to populate the site with your organization's own content.

Preview Public Site

To preview how your public site appears to visitors, follow the steps b5elow.

1. From the **Main Menu**, click **Design My Public Site**.
2. A preview of your VAC's public site as it has been configured will appear. You may navigate to and preview other areas of the site by clicking on menu items.

Edit Public Site Appearance

To edit the appearance (i.e., color scheme, layout) of your public site, follow the steps below.

1. From the **Main Menu**, click **Design My Public Site**.
2. Click the arrow next to "Edit Template" on the right side of the screen. This will expand the templates and configurations panel.
3. In the "Templates" tab, select your desired template.
4. In the "Configure" tab, select your desired colors for the template and background.
5. If desired, you may connect to your Google Analytics account by entering the HTML code from Google in the "Google Analytics Script" content box.
6. When done, click **Save Changes** and collapse the panel by clicking the arrow.
   Note: If you wish to preview the changes you made, click **Preview**.

Edit Public Site Content

To edit the content (i.e., text, images, pages) that appears on your public site, follow the steps below. To begin, go to the **Main Menu** and click **Design My Public Site**. Then, click **Edit Template** on the right side of the screen.

Note: If at any time you wish to preview the site, save your work and click **Preview**.

Public Site Widgets

Each public site on Fundly is preconfigured to display certain elements, or "widgets." These widgets appear within dotted lines and can be edited. To edit a widget, click its **edit icon** or click within the dotted lines. Widget types are explained below.

1. **Logo**: Upload an image of your logo and a URL to which the image redirects users
2. **Need Help Text**: Provide information on whom volunteers and users should contact if they experience any problems

   👍 It is recommended that you provide at least your organization's phone number and/or email address.
3. **Menu(s)**: Add or edit the items that appear in a menu (i.e., navigation bar); Refer to the Public Site Menu Items section below for more detail
4. **Image Slider**: Upload images to display in a slider on Home page
5. **Summary**: Select which summary items (e.g., Number of Volunteers) you wish to display
6. **Home Content**: Add content (e.g., text, images) to appear on Home page
7. **Hide/Show Recent Opportunities**: Hide or show your Featured Opportunities
8. **Social Media Settings**: Add URLs for your social media sites

Public Site Menu Items

Public sites contain two *menus* (i.e., navigation bars) which consist of *menu items*. Menu items are each created from a different *menu type* (explained in step 3 below). When clicked, a menu item brings the user to another page on your public site or to a designated external link. Menus can be edited and customized.

1. To edit a menu, click its **edit icon**. A list of its current menu items will appear.
   Note: Some menus are not visible from the home page. To access these menus for editing, click on **Preview**. Click on the desired tab (e.g., Organizations, Volunteers, Teams) to open its respective menu, then return to the **Edit Template** screen.
2. To create a new menu item, click **Add New Menu Item**.
3. Select a "*Menu Type*" from the dropdown menu. Menu types are explained below. For most menu types, you must enter a "Name" (i.e., the text appearing in the menu) and a "Title" (i.e., the text appearing as the page title). Some menu types require additional steps, as explained below.
   Note: By default, many menu types are already built-in to the menus on the public site template. While you may add multiple menu items of the same type, multiples of some menu types (e.g., Organization Signup, Volunteer Signup, Calendar) will link directly to the content of the original menu item.
   Text Page: Page containing only text, images, and videos (i.e., an "About Us" page)
   a. Enter the desired text in the "Content" box.
   b. Use the formatting options to add additional content (i.e., add images, embed YouTube videos, create tables)
   c. When done, click **Save**.

Volunteer/Organization/Team Signup: Links to volunteer, organization, or team signup and registration page
   a. Enter the desired text in the "Content" box, if applicable.
Search Opportunity: Links to a page on which users can search through your VAC's and your partner organization's opportunities
Organization Lookup: Links to a page listing your partner organizations
Programs: Links to a page listing your programs
Home: Links to your public site's home page
Note: It is advised that each public site contains only one Home menu item.
   a. Enter the desired text in the "Content" box.
      Note: Any text content added here will override the text content of your "Home Content" widget (see item 6 of the Public Site Widgets section above).
Calendar: Links to a calendar of your public opportunities and trainings
   a. To edit a calendar's default settings, click **Preview**.
   b. Click on the menu item that links to the calendar.
   c. After the calendar opens, click **Edit Template**.
   d. Click the calendar's **edit icon**.
   e. In the "Edit Calendar Settings" window, select your desired default view and filter options for the calendar, then click **Save**.
External URL: Links to a designated external site
   a. Enter the desired site in the "External URL" field.
Team List: Links to a page listing your teams

4. In some menus, you can add an additional level to a menu item, or a *sub menu*. To add a sub menu, open the edit window for the menu in which it is located, locate the desired menu item, then click **Add Sub Menu** in its dropdown menu. The sub menu will appear on the page of its parent menu.
   Note: Do not add sub menus to menu items that link to external pages, as these sub menus will have no page on which to appear.
5. To rearrange the order in which the menu items appear, click and drag each item.
6. To edit a menu item, click **Edit**.
7. To delete a menu item, click **Delete** in its dropdown menu.

Update your Public Site's URL

You are able to customize the URL for your VAC's public site. The customization will appear at the end of the standard Fundly Connect™ public site URL, http://connect.fundly.com/site/.
♦ If your organization desires more customization, Fundly Connect™ also offers a Vanity URL add-on in the Purchase Add-Ons section. A Vanity URL serves as a powerful marketing tool for an organization to promote its brand to partners and volunteers.
1. Open the **Main Menu**.
2. At the bottom of the menu, click the **edit icon** next to your site's current URL.
3. Type the desired name for your new URL, then click **Save & Close**.

Associate with another VAC

Associate with another Volunteer Action Center (VAC)

As a VAC, you are also able to associate with other VACs and their programs. This feature is helpful for joint projects and for promoting your opportunities to a larger audience, as it allows your organization to create opportunities that are available to both your own and another VAC's volunteers.

Note: VACs that associate with each other are typically located in close proximity to one another. So while these associations are possible, they are uncommon.

1. From the Dashboard, click **My Associations**.
2. Click **Add Association**.
3. Search for the name of the desired VAC. Once found, click on its name.
4. A list of the VAC's programs will appear. If the VAC does not offer any programs, the screen will remain blank.
5. Under "Programs," check the boxes next to any programs with which you wish to associate.
   Note: Click the **search/view icon** to view a description of the program.
6. If an agreement is required to participate in the program, it will appear below the program's name. Read the agreement, then sign in the field provided.
7. Click **Save And Associate**. Click **Close**.

Remove an Association

To remove an association, follow step 4 of the Deactivate, Activate, or Remove a Partner Organization tutorial to remove the organization or VAC from your database.

Associate with a Program

Once you are associated with a VAC, you can associate with any of the center's programs. While you had the opportunity to select programs when associating with the VAC, you can add program associations here.

1. From the Dashboard, click **My Associations**.
2. Click **the name of the desired VAC**.
3. Under "Programs," check the boxes next to any programs with which you wish to associate.
4. Click **Save**. Before being finalized, the VAC may need to approve your request.

Create Opportunities

VACs can create basic and advanced opportunities to share with their volunteers on Fundly Connect™. These opportunities can be created for your own organization, or on behalf of a partner organization. After opportunities are created, organizations can manage them by making edits, managing applicants, and assigning volunteers.

👍 For opportunities created for your own organization, be sure to follow the Approve, Reject, or Remove Volunteers tutorial in the days and weeks after creating an opportunity. This will allow you to approve or reject volunteers who apply.

Create a Basic Opportunity

Basic Opportunities are simple opportunities for one time and ongoing events that do not include multiple shifts or locations. To add a basic opportunity, begin in the Dashboard. Click the **add icon** in the Quick Menu, then click **Add Opportunity – Basic**.

Basic Information

1. At the top of the screen, keep the slider set to **Active**.
2. In the "On behalf of" dropdown menu, select the partner organization for which you are creating this opportunity. If you are creating this opportunity on behalf of your own organization, leave this field blank.
3. Select an Opportunity Owner.
   a. If you are creating this opportunity on behalf of your own organization, select the user who will be managing this opportunity from the "Opportunity Owner" dropdown menu. If the user who is currently logged in will be managing the opportunity, select **Me**.
      Note: VAC accounts are able to create multiple users, each with their own username and password. To create a user, follow the Manage User List tutorial.
   b. If you are creating this opportunity on behalf of a partner organization and wish to choose a different user, click **Change** under "Opportunity Owner." Then, click **Our Staff Users** to select a user from your own organization, or **Partner Organization Staff Users** to select a user from the partner organization. When done, click **Save**.
4. Enter the Opportunity Name.
5. If this opportunity will not take place at a physical location, set the **Virtual Opportunity** slider to "Yes."
6. If this opportunity will not take place at the default address listed under "Location(s)," click the **Edit** button. Enter the new address, then click **Save**.
7. Under "Opportunity Details," enter a description of your opportunity. This description will appear on the public site, exactly as entered.

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👍 This description should be professional in nature, so be sure to use complete sentences and proper grammar. Try to mirror a job description on a job-posting site by including details about the activities in which volunteers will be involved.

8. Under "Program(s), select the program(s) with which this opportunity is associated.
Note: If you are creating this opportunity in association with another VAC, you will have the option to select programs associated with the VAC in the Publish section.

9. Under "Position(s)," the opportunity will default to a single position called "Volunteer." To add more positions, click **Add Position**. Enter the new position name (e.g., cashier) and an estimated hourly value (e.g., $10), if desired. Click **Save**.

👍 Positions represent the different jobs a volunteer might perform within an opportunity. Use them to help you coordinate volunteers by designating different tasks to different positions in the same opportunity.

10. Under "Schedule," designate this opportunity as "One Time" (a one day event) or "Ongoing" (a multiple day event or an ongoing opportunity). Then, set the Start Date and End Date, if applicable.

11. Under "Shift," designate the Start Time and End Time that the opportunity is available. Or, if the time frame can be set around a volunteer's availability, activate the **Flexible Time** slider.

12. Click **Save & Next**.

Requirements

1. Under "Keywords," enter keywords related to the opportunity to help potential volunteers locate it (e.g., animals, charity walk, environment). To enter a keyword, type the word or phrase, then press the "enter" key on your keyboard.

👍 Enter as many keywords as possible. Keywords help you initiate the vetting process by attracting volunteers that truly match the opportunity.

2. Select the Cause(s), Skill(s), and Activity Type(s) associated with this opportunity.

3. If you wish to allow volunteers to manage their own schedule, activate the **Volunteer can schedule for this opportunity** slider.

4. If you wish to display this opportunity on your public calendar, activate the **Display on Public Calendar** slider.

5. If you wish to allow volunteers to log their own hours, activate the **Volunteer can log hours for this opportunity** slider.
Note: The opportunity owner or organization must still verify all hours logged by volunteers.

6. To require that a volunteer's application be reviewed before they are allowed to volunteer for an opportunity, activate the **Approval required for volunteer application** slider.
Note: This option may not appear for opportunities created on behalf of another organization.

7. If a slider for **Background check required for Volunteer** appears, keep it inactivated.
Note: Background checks are an advanced feature not covered in this guide.

8. If a volunteer must attend an orientation or training session before they can be considered a volunteer, activate the **Orientation and/or training is required…** slider and select the desired training(s).
Note: These sessions must have been previously created to be selected here.

9. Under "Who will be benefited by this opportunity," select the Age Group(s), Population(s), and Gender(s) of those who will be assisted by the volunteers.

10. Under "Appropriate for which type of volunteers," select all age groups that are appropriate for this opportunity.

11. If volunteers may apply as a Group or Team, activate the **Groups/Teams are allowed to apply...** slider. To require information about each individual member of a group or team, active the **Team Member(s)' information required...** slider.

12. To require that volunteers fill out an application form when they apply, you may add one under "Associate Application Form." To add a previously created form, select it from the "Application Form" dropdown menu. To create a new form, click **Add** and follow steps 3-7 from the Create an Application Form tutorial.

13. The "Auto Check Out" tool expedites the process of logging volunteers' hours. Without this tool, organizations must manually enter the number of hours a volunteer has worked. With the tool, organizations can automatically log hours based on the length of a volunteer's assigned shift or schedule. The condition that you select from the "Auto Check Out Type" dropdown menu will determine the number of hours that are logged when "checking out" a volunteer.
Note: To check out volunteers, follow the Log Hours Using the Attendance Tool tutorial.
    a. Shift End: Log hours according to the scheduled end time for the opportunity
    b. Volunteer Schedule End Time: Log hours according to the end time that the volunteer has scheduled
    c. After a set amount of time: Log a specified number of hours for all volunteers who you check out for this opportunity

14. If you wish to have a volunteer's hours automatically logged after using the check out tool (i.e., attendance tool), keep the **Auto Log Hours When Marked As Attended** slider activated.

    👍 When an opportunity involves a large volume of volunteers or shifts, it is recommended that organizations keep this slider activated and utilize the auto check out tool. This tool simplifies the logging of volunteers' hours by eliminating the need to track or remember the schedule and hours of each individual volunteer.

15. Next to **Allow Volunteer(s) To Cancel Opportunity Before**, you can restrict a volunteer's ability to cancel their shift(s) for an opportunity by entering the number of hours of notice needed by the organization (i.e., entering "24" allows a volunteer to cancel their shift up to 24 hours before it starts). If left blank, volunteers can cancel a shift any time.

16. Click **Save & Next**.

Publish

1. In the date field, set the date on which you wish to publish this opportunity.

2. To publish the opportunity on your public site, click **Publish on Site**.
3. If you wish to publish this opportunity on another VAC's public site as well, check the box next to the name of the VAC under "Publish/Unpublish to Action Center."
4. If you are associated with any of the VAC's Programs, they will appear below its name. If this opportunity is linked to a particular program, check the box next to its name. If no programs appear and you wish to use this feature, follow the Associate with a Program tutorial.
5. Click **Publish/Unpublish to Action Center** at the bottom right hand corner of the screen.
   Note: In order for your opportunity to be visible to the selected VAC's community of volunteers, you must complete this step.
   Note: If the opportunity is associated with another VAC, they may need to approve your opportunity before it becomes visible to volunteers.

Create an Advanced Opportunity

Advanced opportunities are more complex than basic opportunities and can include multiple locations, schedules, and volunteer shifts. To add an advanced opportunity, begin in the Dashboard. Click the **add icon** in the Quick Menu, then click **Add Opportunity – Advanced**.

Basic Information

1. Follow steps 1-9 from the Basic Information section of the Create a Basic Opportunity tutorial above.
2. If this opportunity will take place at multiples locations, click **Add Location** under "Location(s)." Enter a unique title and address for the location, then click **Save**.
3. To delete a location, click **Delete** in the dropdown menu.
4. Click **Save & Next**.

Requirements

1. Follow the Requirements section of the Create a Basic Opportunity tutorial above.

Scheduling And Shift

1. In the "Schedule for" dropdown, select the location to which this schedule applies.
2. Select one of the following as the basis of your scheduling:
   a. **One Time:** One day event
   b. **Weekly:** On a weekly basis
   c. **Monthly:** On a monthly basis
   d. **Ongoing:** Multiple day event or ongoing opportunity
   e. **Other:** Untraditional schedules occurring on random dates
3. Set a date(s) or date range.
4. If applicable, select the days of the week and/or days of the month when this schedule will occur.
5. Under "Date Exceptions," enter any dates or date ranges during which this schedule does not apply, then click the **add icon**.

6. To complete this schedule, click **Save**.
7. The "Add/Edit Shift" window will open, allowing you to set a Shift (i.e., start and end time) for this schedule.
   a. Enter a Shift Name.
   b. If applicable, select the Shift Day(s) to which this schedule applies.
   c. Set the Start and End Times. If volunteers can attend the opportunity based on their own availability, leave Start and End Times blank and activate the **Flexible Time** slider.
   d. If applicable, select the Positions to which this shift applies and set the maximum capacity for each position, if desired.
      Note: Once an opportunity reaches its capacity, volunteers will no longer be able to sign up.
   e. If you are done, click **Save**. If you would like to set an additional shift for this schedule, click **Save And Add New** and repeat the above process.

      👍 Set a second shift when you would like to offer multiple shifts on the same day, set different shift times for different days of the week, etc.
8. To set an additional schedule, repeat steps 1-7 above.
9. To edit a schedule, click **Edit** next to the desired schedule. Use the tools on the left of the screen to make desired edits, then click **Save**. To delete a schedule, click **Delete** in its dropdown menu, then click **OK**.
10. To edit a shift, click **View Shift** under the desired schedule. Click **Edit**, makes desired changes, then click **Save**. To delete a shift, click **Delete** in its dropdown menu, then click **OK**.
11. When done setting schedules, click **Save**, then click **Next**.

Publish

1. Follow the Publish section of the Create a Basic Opportunity tutorial above.

Manage your VAC's Opportunities

After creating opportunities for your VAC in Fundly Connect™, you must manage them. Your VAC can view all of its own opportunities, as well as details such as the number of volunteers and hours contributed to each opportunity, in both list and calendar format. You can also use this section to edit, copy, delete, and inactivate your opportunities.

View your Opportunities

1. From the **Main Menu**, click **Our Opportunities**. Alternatively, click **Active Opportunities** in the Dashboard.

2. A list of your organization's active opportunities and their details will appear. To view inactive opportunities, click on **Inactive** at the top of the screen.
3. To view filtered opportunities: Select a filter from the "Filter By" dropdown at the top of the screen. Complete the field, then click **Filter**.
4. To view opportunities in a calendar format: Click **Calendar View** at the top of the screen.
    a. The calendar displays only one opportunity at a time. Select the opportunity you wish to view from the "Volunteer Opportunity" dropdown. If desired, use the "Program" dropdown to filter opportunities.
    b. To print a calendar, select the desired opportunity, then click **Print** at the bottom right corner of the screen. Select the period of time and the data you wish to include. Click **Print**. The calendar will be converted into a file, which you can save to your computer and print.
5. To view opportunities in a list format: Click **List View** from the calendar view.

Edit your Opportunities

1. From the **Main Menu**, click **Our Opportunities**. Alternatively, click **Active Opportunities** in the Dashboard.
2. To edit an opportunity: Click **Edit** and follow the Create a Basic Opportunity or Create an Advanced Opportunity tutorial.
3. To copy an opportunity: Click **Copy Opportunity** in its dropdown menu. Create a new opportunity name to distinguish it from the original, then click **Copy**.
Note: The opportunity will appear in your opportunity list, but will remain unpublished until you create a schedule and publish.
4. To delete an opportunity: Click **Delete** in its dropdown menu, then click **OK**.
Note: Deleting an opportunity also deletes all of the data (e.g., logged hours) associated with it. Only delete opportunities that were never published or were canceled before receiving any volunteer applications. Inactivate all other opportunities.
5. To inactivate an opportunity: Click **Edit**. Set the slider at the top of the screen to **Inactive**, then click **Save Only**.

Manage Partner Organizations

As a VAC, you can manage the partner organizations that associate with you in Fundly Connect™. This includes approving or rejecting initial association requests, as well as editing, adding, (de)activating, and removing partner organizations.

Approve or Reject a Partner Organization

When an organization requests to associate with your VAC, you must approve or reject the request.

1. In the Dashboard, click **Organizations Awaiting Approval**. Alternatively, from the **Main Menu** click **Organizations**, then click the **Approval Pending** tab.
2. A list of organizations awaiting approval will appear.
3. To approve an organization: Click **Approve**.
   Note: If you wish to also approve or reject the organization's program associations, follow steps 3-5 from the Approve or Reject an Organization's Program Association tutorial.
4. To reject an organization: Click **Reject**.

   👍 If the organization is not a match for your VAC, follow up with a phone call or email to let them know.

View and Edit a Partner Organization

1. From the **Main Menu**, click **Organizations**. Alternatively, click **Active Nonprofit Organizations** in the Dashboard.
2. A list of your active partner organizations will appear. To view inactive organizations, click **Inactive** at the top of the screen.
3. To view the programs an organization is associated with: Click the **open icon** next to "Associated Programs."
4. To view details about an organization: Click **View** in its dropdown menu.
5. To edit details about an organization: Click **Edit** next to the desired organization. Make the desired changes, then click **Save** or **Save And Next** until you are done editing.

Add a Partner Organization

While organizations can apply to be a part of your VAC, you can also manually add a partner organization to your account.

Note: Adding a partner organization to your VAC does *not* create an account for the partner organization. Your VAC must manage the organization internally. If you wish to create an account for a partner organization to manage externally, log out of your VAC account, create an account from your public site, and give the login credentials to the organization.

1. Click the **add icon** in the Quick Menu, then click **Add Organization**. Alternatively, from the **Main Menu**, click **Organizations**, then click **Add New Organization** at the bottom right corner of the screen.
2. Enter the organization's basic information. An Organization Name and a primary contact's First Name, Last Name, and Email address are required. When done, click **Save And Next**.
3. Select the Programs you wish the organization to be associated with. Click **Save And Next**.
4. If necessary, provide and save any additional information.

Reset a Partner Organization's Password

While partner organizations are able to reset their own passwords, some organizations may request help doing so.

Note: Do not reset an organization's password without their permission.

1. From the **Main Menu**, click **Organizations**. Alternatively, click **Active Nonprofit Organizations** in the Dashboard.
2. A list of your active partner organizations will appear. To view inactive organizations, click on **Inactive** at the top of the screen.
3. Click **Reset Password** in the dropdown menu next to the desired organization.
   Note: The password reset feature is not available for organizations that were added by your VAC using the Add a Partner Organization tutorial, as they have no account login or password.
4. In the "Reset Organization Password" window, enter the email address(es) to which you would like a temporary password sent. A temporary password will also will be sent to the organization's original user email.

Deactivate, Activate, or Remove a Partner Organization

1. From the **Main Menu**, click **Organizations**. Alternatively, click **Active Nonprofit Organizations** in the Dashboard.
2. To deactivate an organization: Click **Active** at the top of the screen. Then, click **Deactivate** in the organization's dropdown menu. It will now appear under your "Inactive" organizations.
   Note: Deactivating an organization allows you to reactivate it again, whereas removing an organization permanently removes it from your VAC.
3. To activate an organization: Click **Inactive** at the top of the screen. Then, click **Activate** in the organization's dropdown menu. It will now appear under your "Active" organizations.
   Note: You can only activate an organization that has previously been deactivated.
4. To remove an organization: Click **Remove Organization** in its dropdown menu, then click **OK**.
   Note: Removing an organization from your VAC's account does not affect the volunteers who are scheduled for its opportunities.
   Note: Once an organization is removed, it must reapply to become associated with your VAC again.

Manage Partner Opportunities

When a partner organization posts an opportunity, your VAC has the ability to manage certain aspects of it. This includes approving or rejecting new opportunities, as well as editing, (un)publishing, and managing the calendar settings for existing partner opportunities.

Approve or Reject Partner Opportunities

If you selected "Review Required" for partner opportunities in your General Settings, you must either approve or reject each opportunity posted by a partner organization.

Note: If you wish to edit your settings regarding approval for partner opportunities, follow the Partner Opportunity section of the General Settings tutorial.

1. In the Dashboard, click **Opportunities Awaiting Approval**. Alternatively, from the **Main Menu** click **Partner Opportunities**, then click the **Approval Pending** tab.
2. To view details about an opportunity before approving or rejecting it, click on **the opportunity name**.
3. To approve and publish an opportunity: Click **Approve And Publish** in its dropdown menu.
4. To approve an opportunity: Click **Approve**.
   Note: The opportunity will remain unpublished. If you wish to publish the opportunity, you must follow the Unpublish or Publish Partner Opportunities tutorial.
5. To reject an opportunity: Click **Reject** in its dropdown menu.

View Partner Opportunities

1. From the **Main Menu**, click **Partner Opportunities**. Alternatively, click **Active Partner Opportunities** in the Dashboard.
2. A list of your partner organizations' active opportunities will appear. To view inactive opportunities, click on **Inactive** at the top of the screen. To view both active and inactive opportunities, click on **All**.
3. To view details about an opportunity, click on **the opportunity name**.
4. To view opportunities that have been **Approved**, are **Approval Pending**, or **By Program**, click the desired tab.
5. To view filtered opportunities, using the filter bar at the top of the screen. Complete the desired fields, then click **Filter**.

Edit Partner Opportunities

As a VAC, you can only edit a partner's opportunity if you created the opportunity on their behalf.

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1. From the **Main Menu**, click **Partner Opportunities**. Alternatively, click **Active Partner Opportunities** in the Dashboard.
2. Next to the desired opportunity, click **Edit** in its dropdown menu.
3. Follow the Create a Basic Opportunity or Create an Advanced Opportunity tutorial to make the desired changes.

Unpublish or Publish Partner Opportunities

While a VAC cannot inactivate a partner opportunity, it can unpublish an opportunity that has been published by a partner organization. Opportunities can continue to be published and unpublished as desired.

Note: As an exception, a VAC can inactivate a partner opportunity if it created the opportunity on an organization's behalf.

Note: An *unpublished* opportunity is removed from the VAC's database and site. An *inactivated* opportunity remains in the VAC's database and in its list of inactive opportunities.

1. From the **Main Menu**, click **Partner Opportunities**. Alternatively, click **Active Partner Opportunities** in the Dashboard.
2. To unpublish an opportunity: Next to the desired opportunity, click **Unpublish**.
3. To publish an opportunity: Click **Publish** next to the desired opportunity. Then, set your "Display On Calendar" status and click **Save and Publish**.
   Note: For some opportunities, you must instead click **Edit** and follow the Publish section of the Create a Basic Opportunity tutorial to republish.

Display or Hide Partner Opportunities from Calendar

You can choose to hide or display partner opportunities from your VAC's public calendar.

1. From the **Main Menu**, click **Partner Opportunities**. Alternatively, click **Active Partner Opportunities** in the Dashboard.
2. If you wish to display an individual opportunity on your public calendar, click **Display on calendar** in its dropdown menu.
3. If you wish to remove an individual opportunity from your public calendar, click **Hide from calendar** in its dropdown menu.
4. If you wish to restrict the types of opportunities (e.g., OneTime, Ongoing, Recurring) that appear on your public calendar, click **Settings**. To remove an opportunity type from appearing on the public calendar, inactivate its slider. When done, click **Save**.

Manage Volunteers of Opportunities

VACs must manage the volunteers who have applied or are volunteering for their opportunities. While VACs are responsible for managing volunteers of their own opportunities, they can also manage volunteers of their partner opportunities.

Approve, Reject, or Remove Volunteers

When a volunteer applies for one of your VAC's own opportunities, you will receive an email notification. Follow your organization's standard screening process to approve or reject volunteer applicants. If you did not select "Approval required for volunteer application" during the opportunity creation process, all applicants are automatically approved unless removed from the opportunity.

Note: VACs do not have the ability to approve or reject volunteers from partner opportunities, but they do have the ability to remove volunteers who have already been approved.

👍 We recommend you respond to volunteers regarding their applications within 24-48 hours.

👍 After volunteers are accepted for an opportunity, be sure to follow the <u>Log or Verify Hours for a Volunteer</u> tutorial as volunteers begin accumulating hours.

Approve or Reject an Applicant

If you selected "Approval required for volunteer application" during the opportunity creation process, you must either approve or reject each applicant who applies to your opportunity.

1. From the **Main Menu**, click **Our Opportunities**. Alternatively, click **Active Opportunities** in the Dashboard.
2. Next to the desired opportunity, click **the number** that appears in the "Volunteer Awaiting Approval" column.
3. To approve a volunteer: Click **Approve**. If prompted, you may choose to review or not review the volunteer's application form by clicking **Yes** or **No**, respectively.
4. To reject a volunteer: Click **Reject** in the dropdown menu.

    👍 If the applicant is not a match for your organization, follow up with a phone call or email to let them know.

Remove a Volunteer from an Opportunity

To remove an applicant from an opportunity, follow the steps below.

1. Click on the **Main Menu**.
    a. For volunteers of one of your VAC's own opportunities, click **Our Opportunities**..
    b. For volunteers of a partner opportunity, click **Partner Opportunities**.
2. Next to the desired opportunity, click **Manage Volunteers** in the dropdown menu,

3. Next to the appropriate volunteer, click **Remove Volunteer**, then click **OK**.

   👍 After removing a volunteer, follow up with a phone call or email to let them know.

View all Volunteers of an Opportunity

1. Click on the **Main Menu**.
   a. For volunteers of one of your VAC's own opportunities, click **Our Opportunities**.
   b. For volunteers of a partner opportunity, click **Partner Opportunities**.
2. Next to the desired opportunity, select **Manage Volunteers** from the dropdown menu. A list of all of the opportunity's volunteers will appear.
3. To create an Excel spreadsheet containing the volunteers' names, contact information, and hours, click **Export** at the bottom right corner of the screen.
4. Follow your computer's prompts to open and save the file.

Assign Volunteers to an Opportunity

Though volunteers typically apply for opportunities themselves, you can also assign them to opportunities.

Assign an Individual Volunteer

Use this tutorial to assign one volunteer to an opportunity. You may also use this method to assign a team to an opportunity.

1. Click on the **Main Menu**.
   a. For volunteers of one of your VAC's own opportunities, click **Our Opportunities**. *Note:* Alternatively, you can click **Manage Volunteers** and click **Assign to an Opportunity** in the dropdown menu of the desired volunteer, then select the opportunity to which you wish to assign.
   b. For volunteers of a partner opportunity, click **Partner Opportunities**. For the desired opportunity, click on **the opportunity name**.
2. In the dropdown menu of the desired opportunity or at the bottom right corner of the screen, click **Assign Volunteer**.
3. In the "Choose Volunteer or Team" field, type the name of the desired volunteer or team. *Note:* While the steps below demonstrate how to add a volunteer to an opportunity, you may also add a team.
   a. If the volunteer exists in the system, their name will appear. Click on the volunteer's name.
   b. If the volunteer does not exist in the system, press **Enter** on your keyboard. A window will open allowing you to manually enter the volunteer. If you wish to create a user account for the volunteer, set the slider to **Yes**; the volunteer will receive an account set-up email. Enter the volunteer's First and Last Names, Email, and Mobile Phone number. Then, click **Save**.
4. Click **Assign Volunteer**. When the process is complete, click **Close**.

Assign Multiple Volunteers Using Quick Assign and Schedule

Use this tutorial to assign multiple volunteers to an opportunity at the same time using the "Quick Assign and Schedule" feature. This method also allows you to create "configurations" for volunteer assignments, where you can preset details such as opportunity location, shift, and dates to use again for future quick assigns.

Note: This section applies only to your VAC's own opportunities.

1. From the **Main Menu**, click **Quick Assign and Schedule**.
2. Select an Opportunity from the "Select Opportunity" dropdown menu.
3. If you have previously set up a configuration for this opportunity that you wish to use, click **Assign Volunteer** in its dropdown menu and skip to step 10.
   Note: To edit a configuration, click **Edit** in its dropdown menu.
4. Create a Configuration Name.
   Note: A configuration allows you to save these settings to use for future quick assigns.
5. Select a Location, Shift, and Position.
6. Select a From Time and To Time.
7. Select a Start Date. Then select the date(s) to which you wish to quick assign volunteers from the Availability dropdown menu.
   Note: If your desired availability dates do not appear, select a start date that is closer in proximity.
   Note: If you wish to select additional dates, you may have to set up an additional configuration and complete this tutorial again.
8. Select how you would like to proceed if the schedule you selected has already reached its full capacity of volunteers.
   a. Do not assign: Do not assign volunteer(s) to any dates
   b. Proceed anyway: Assign volunteer(s) to all dates, regardless of full capacity
   c. Add to available dates: Assign volunteer(s) to the dates that are still available
9. When done, click **Save and Next.**
10. If you wish to change the Configuration you are using, select it from the dropdown menu.
11. Enter the No. Of Volunteer(s) that you wish to quick assign to the opportunity. Click anywhere on the screen to activate your selection.
12. Under "Assign Volunteer," an entry space will appear for each volunteer you wish to assign.
13. The Location, Shift, Position, From Time, To Time, Start Date..., and Availability dates will default to the configuration's settings for each volunteer . If you wish to change any of these settings for a volunteer, you may do so using the fields provided.
14. In the "Choose Volunteer" field, type the name of the desired volunteer.
    a. If the volunteer exists in the system, their name will appear. Click on the volunteer's name to assign them.
    b. If the volunteer does not exist in the system, press **Enter** on your keyboard. A window will open allowing you to enter the volunteer into the Fundly Connect™

system. If you wish to create a user account for the volunteer, set the slider to **Yes**; the volunteer will receive an account set-up email. Enter the volunteer's First and Last Names, Email, and Mobile Phone number. Then, click **Save**.

15. Repeat steps 13-14 for each volunteer. When done, click **Save**.

Assign a Volunteer to a Location

For opportunities occurring at multiple locations, organizations can assign volunteers to a location.

👍 This tool is helpful when dividing large opportunities between multiple volunteer coordinators. The workload can be easily divided by assigning each volunteer coordinator to manage the volunteers of a particular location using the Assign a Volunteer Coordinator to an Opportunity tutorial.

1. Click on the **Main Menu**.
   a. For volunteers of one of your VAC's own opportunities, click **Our Opportunities**.
   b. For volunteers of a partner opportunity, click **Partner Opportunities**.
2. Next to the desired opportunity, click **Manage Volunteers** in the dropdown menu.
3. Next to the desired volunteer, click **Add Location** in the dropdown menu.
4. Select the desired location from the dropdown menu, then click **Add** or **Add New**.

Schedule a Volunteer

Before a volunteer can log hours for an opportunity, their shift and schedule must be set. Volunteers may do this on their own, or you may do it for them. VACs can set schedules for volunteers of both their own opportunities and partner opportunities, but they cannot use the mass schedule change tool for volunteers of partner opportunities.

👍 It is recommended that you allow volunteers to set their own schedules. If you decide to set volunteers' schedules, be sure to discuss their availability with them first.

Create a Schedule

1. Click on the **Main Menu**.
   a. For volunteers of one of your VAC's own opportunities, click **Our Opportunities**.
   b. For volunteers of a partner opportunity, click **Partner Opportunities**.
2. Next to the desired opportunity, click **Manage Volunteers** in the dropdown menu.
3. Next to the desired volunteer, click **Scheduling** in the "Next Step" column.
   Note: If the volunteer has not signed up for or attended all required training sessions, "Pending Orientation & Training" or "Pending Attendance" will appear. Follow the Assign a Volunteer to a Training Session or Mark Attendance for a Training Session tutorial if you wish to assign or mark attendance for the volunteer.

Note: If the volunteer has set their own schedule, "Log Hours" will appear. Click **View Schedule** in the dropdown menu to view the schedule.

4. Select the Venue, Shift, and Position to which you are assigning the volunteer.
   Note: By default, you can only select from venues and shifts associated with your VAC's active opportunities. To include venues and shifts from inactive opportunities as well, check the "Select from all Location(s) and Shift(s)" box.
5. Fill in the remaining fields, including From/Till Dates and From/Till Times.
   Note: The remaining scheduling options may differ based on how you originally set up the schedule for this opportunity.
6. Click **Save**.

Edit or Delete a Schedule

1. Click on the **Main Menu**.
   a. For volunteers of one of your VAC's own opportunities, click **Our Opportunities**.
   b. For volunteers of a partner opportunity, click **Partner Opportunities**.
2. Next to the desired opportunity, click **Manage Volunteers** in the dropdown menu.
3. Next to the desired volunteer, click **View Schedule** in the dropdown menu.
4. To edit a schedule: Click **Edit**. Follow steps 4-6 from the Create a Schedule tutorial above.
5. To delete a schedule: Click **Delete** in its dropdown menu, then click **OK**.

Create Multiple Schedules for a Single Volunteer

Sometimes, a volunteer has more than one shift or position that you need to schedule, or the volunteer has differing schedules for different days of the week. In cases like these, you can set multiple schedules.

1. Click on the **Main Menu**.
   a. For volunteers of one of your VAC's own opportunities, click **Our Opportunities**.
   b. For volunteers of a partner opportunity, click **Partner Opportunities**.
2. Next to the desired opportunity, click **Manage Volunteers** in the dropdown menu.
3. Next to the desired volunteer, click **Add Schedule** in the dropdown menu.
4. Follow steps 4-6 from the Create a Schedule tutorial above to fill in the information for the new schedule.
5. If you are done scheduling for this volunteer, click **Save**. If you wish to create another schedule, click **Save & Add New**. Set the new schedule, then click **Save**.

Make Mass Schedule Changes

To change the schedule of multiple volunteers who are scheduled for the same opportunity and shift, Fundly Connect™ features a Mass Schedule Change tool.

Note: Mass schedule changes can only be made for your VAC's own opportunities.

1. From the **Main Menu**, click **Mass Schedule Changes**.
2. Enter the date or date range for which you wish to make a schedule change.
3. To locate the desired opportunity, begin typing its name. When the full name of the opportunity appears, click on it.
   Note: Only advanced opportunities are eligible for mass schedule changes.
4. Select the desired Location, Shift, and Position, then click **Find**.
5. A list of volunteers who match the selected schedule will appear. Check the boxes next to the volunteers whose schedule you wish to change, then click **Change Schedule**.
6. To create the new schedule, follow steps 4-5 of the Create a Schedule tutorial above.
7. When done, click **Save**.
8. To view a history of your previous mass schedule changes, click **History** at the top right corner of the screen.

Log or Verify Hours for a Volunteer

Once a volunteer has been scheduled, they can begin logging their hours. Organizations must verify hours logged by their volunteers. Organizations can also log hours for volunteers either manually, with the quick log tool, or with the attendance tool. VACs can manually log and verify hours for volunteers of both their own opportunities and partner opportunities, but they cannot use the quick log or attendance tools for volunteers of partner opportunities.

👍 To ensure the accuracy of volunteers' hours, do not verify or log hours on behalf of partner organizations unless asked to do so.

♦ With the "Time It!" add-on, an organization can allow its volunteers to log their own hours in real time while volunteering for an opportunity. By entering their unique pin numbers into a computer or mobile device located on-site, volunteers can time-in (i.e., clock-in) when they arrive to an opportunity and time-out (i.e., clock-out) when they leave.

Verify Hours Logged by a Volunteer

If you choose to have volunteers log their own hours, you must verify their hours.

1. Click on the **Main Menu**.
   a. For volunteers of one of your VAC's own opportunities, click **Our Opportunities**.
   b. For volunteers of a partner opportunity, click **Partner Opportunities**.
2. For those opportunities with unverified hours, there will be an amount listed in the "Unverified Hours" column. To review these hours, click **the number** in the column.
3. To approve a time log entry, click **Approve**. To reject a time log entry, click **Reject** in the dropdown menu, enter a reason, and click **Reject**.

Log Hours Manually

1. Click on the **Main Menu**.
   a. For volunteers of one of your VAC's own opportunities, click **Our Opportunities**.
   b. For volunteers of a partner opportunity, click **Partner Opportunities**.
2. Next to the desired opportunity, click **Manage Volunteers** in the dropdown menu.
3. Next to the desired volunteer, click **Log Hours** in the "Next Step" column.
   Note: If the volunteer has not signed up for or attended all required training sessions, "Pending Orientation & Training" or "Pending Attendance" will appear. Follow the Assign a Volunteer to a Training Session or Mark Attendance for a Training Session tutorial if you wish to assign or mark attendance for the volunteer.
   Note: If the volunteer has not set a schedule for this opportunity, "Scheduling" will appear. To set their schedule, click **Scheduling** and follow steps 4-6 of the Create a Schedule tutorial.
4. Select the volunteer's assignment.
5. Next to the desired date(s), enter the number of hours worked and a description of the work.
6. Click **Save & Close**.

Log Hours Using the Quick Log Tool

To log hours for an event or a volunteer in bulk, use the "Quick Log Hours" tool.

Note: The quick log tool can only be used for volunteers of your VAC's own opportunities.

1. Click the **add icon** in the Quick Menu, then click **Add Hours**.
2. Select the desired opportunity.
3. To narrow down the list of volunteers for whom you are logging hours, select a location, shift, and position. To search for a particular volunteer, enter the volunteer's name. Click **Filter**.
4. Enter the From/To Dates for which you are logging hours, and enter a description of the work.
5. In the "Log Hours" column next to each volunteer, enter the total number of hours worked during the entire duration of the dates selected above.
6. Click **Save**.

Log Hours Using the Attendance Tool

To log hours by indicating whether a volunteer attended their scheduled shift, use the "Attendance" tool.

Note: To edit the settings for this tool, follow steps 13-14 of the Requirements section of the Create a Basic Opportunity tutorial.

Note: The attendance tool can only be used for volunteers of your VAC's own opportunities.

1. From the **Main Menu**, click **Our Opportunities**. Alternatively, click **Active Opportunities** in the Dashboard.
2. Next to the desired opportunity, click **Manage Volunteers** in the dropdown menu.
3. On the left of the screen, click **Attendance.**
4. Select the desired date, then click **Get Attendees**.
5. Next to each volunteer who attended their shift on the selected date, click **Check In**. If the volunteer did not attend, click **No Show** in the dropdown menu. Alternatively, to check in *all* of the volunteers listed, click **Check In All**.
   Note: If you kept the "Auto Log Hours When Marked As Attended" slider activated when creating the opportunity, hours that are checked in are automatically counted as verified hours.
6. Repeat steps 4-5 above for each desired date.

View and Edit Logged Hours

View Logged Hours for an Opportunity

1. Click on the **Main Menu**.
   a. For one of your VAC's own opportunities, click **Our Opportunities**.
   b. For a partner opportunity, click **Partner Opportunities**.
2. Next to the desired opportunity, click **the number** indicating "Verified Hours" to view a breakdown of the hours that have been logged and verified for the opportunity.

View and Edit Logged Hours for a Volunteer

1. Follow the View and Edit a Volunteer's Profile tutorial to locate the profile of the desired volunteer.
2. On the volunteer's profile, click on the **Opportunity List** tab.
3. Next to the desired opportunity, click **the number** in the "Verified Hours" column. If a window opens displaying multiple schedules, click **the number** in the "Verified Hours" column of the desired schedule to view a breakdown of the hours that have been logged and verified.
4. In this window, you can also edit the volunteer's hours. To do so, edit the "Description" and/or "Hours" columns, then click **Save**.

Manage Volunteers' Accounts

To better manage their volunteers, organizations have the ability to edit volunteers' accounts. These tools allow you to create volunteer accounts, edit profiles, assign tags, reset passwords, and (de)activate or remove volunteers.

Manually Create a Volunteer's Account

On occasion, it becomes necessary to manually create a volunteer's account instead of relying on the volunteer to create their own account.

1. Click the **add icon** in the Quick Menu, then click **Add Volunteer**. Alternatively, from the **Main Menu**, click **Add Volunteer**.
2. Enter the volunteer's personal information (only first and last names are required).
3. To allow the volunteer to manage their own account, check the **Send Account Setup Link to the volunteer** box at the top. Enter an email address for the volunteer.

   👍 This is highly recommended, as it allows the volunteer to personalize their own account.
4. Click **Save**.
5. After saving, several tabs will become available in which you can provide additional information about the volunteer. If desired, complete each tab, clicking **Save and Next** or **Save** after each.

Search for Volunteers

VACs can conduct searches to locate volunteers. Basic searches locate individual volunteers by name, while advanced searches locate multiple volunteers based on specified criteria (e.g., zipcode, hours volunteered, skills). Searches also provide access to volunteers' profiles, where you can review a volunteer's activity and account information.

1. Click the **Search icon** in the Quick Menu.
   a. To search for an individual volunteer, enter the volunteer's name in the search bar. Press **Enter** on your keyboard and proceed to step 6.
   b. To conduct an advanced search, click **Advanced Search**.
      Note: You can also access the advanced search tool by clicking **Main Menu**, then **Search Volunteer**.
2. Under "Volunteer Information," fill in any criteria you wish to use to narrow your search.
3. Under "Other Criteria," add any additional criteria. Follow steps 1-8 of the Select Recipients section of the Send Advanced Communication tutorial for help.
4. When done, click **Search**. A list of volunteers who match your search will appear.

   👍 As a shortcut to using the Default Reports and Custom Reports features, try conducting an advanced search for volunteers and clicking the **Export** button. Fundly Connect™ will generate an Excel file of the volunteers who match the search.
5. If you wish to edit your search criteria, click **Update Search** at the top right corner of the screen, enter the desired criteria, and click **Save**.
6. To view a volunteer's profile, click on the name of the volunteer.
   Note: If only one volunteer matched your search, the volunteer's profile will open automatically.

View and Edit a Volunteer's Profile

All of a volunteer's activities (e.g., trainings, hours) and account information (e.g., contact information, causes) can be found on their volunteer profile. Organizations can also edit a volunteer's profile.

👍 A volunteer's profile includes their personal preferences and information. Do not edit a volunteer's profile unless they request your help or you need to add information for administrative purposes.

1. Open the desired volunteer's profile using the Search for Volunteers tutorial.
2. To edit the volunteer's information, click **Edit Volunteer**.
3. Make the desired changes, then click **Save and Next**.
4. When done, click **View Volunteer** to return to the volunteer's profile.

Assign Tags to Volunteers

A tag is a flag that can then be used to quickly identify a specific group of volunteers. Tags are created in the Tags section of the Configurations tutorial and can be assigned to volunteers here.

👍 To locate all volunteers who have a specific tag, conduct a Search for Volunteers and select the tag in the "Criteria" section.

1. From the **Main Menu**, click **Manage Volunteers**. Alternatively, click **Active Volunteers** in the Dashboard.
2. To assign tag(s) to an individual volunteer: Click **Assign Tag(s)** in the volunteer's dropdown menu. Select the desired tag(s), then click **Assign**.
3. To assign tag(s) to multiple volunteers: Check the boxes next to the names of the desired volunteers. Then, select **Assign Tag(s)** from the "Action" dropdown menu and click **Apply**. Select the desired tag(s), then click **Assign**.
4. To assign tag(s) to all of the volunteers listed: Select **Assign Tag(s) To All** from the "Action" dropdown menu and click **Apply**. Select the desired tag(s), then click **Assign**.

Schedule Time Off for a Volunteer

The Time Off feature allows you to schedule a "leave" for volunteers while at the same time cancelling all their scheduled opportunities on those dates. This will also remind you not to schedule the volunteer since the volunteer is unavailable on those dates.

Note: Use the "Time Off" only when the volunteer is temporarily taking a time off from volunteering.

1. Open the desired volunteer's profile using the Search for Volunteers tutorial above.
2. To schedule the volunteer's time off, click **Schedule Time Off.**
3. Select which type of Time Off (e.g. Vacation) you're scheduling. The selection will differ depending on your Time Off configuration.
4. Set the "From" and "To" dates which will cover the dates of the volunteer's time off.

5. The "Reason" field is optional.
6. Click **Next**.
7. If there are volunteer schedules that fall within the Time Off dates, it will display those impacted opportunities and you'll have to click **Confirm and Proceed**.
8. After the Time Off is saved, it will cancel the volunteer schedules and you will find this Time Off under the volunteer's "Vacation History".

Reset a Volunteer's Password

While volunteers are able to reset their own passwords, some volunteers may request help doing so.

Note: Do not reset a volunteer's password without their permission.

1. Conduct a search for the volunteer using the Search for Volunteers tutorial. Alternatively, from the **Main Menu** click **Manage Volunteers**. Locate the volunteer, click **Reset Password** in the volunteer's dropdown menu, and skip to step 3.
2. A list of volunteers who match your search will appear. Click **Reset Password** in the dropdown menu next to the desired volunteer's name.
   Note: If only one volunteer matched your search and the volunteer's profile opened automatically, return to step 1 above and conduct a broader search. The password reset feature is not available on a volunteer's profile and must be accessed from the list view.
3. A temporary password will be sent to the volunteer's email address.

Deactivate or Activate a Volunteer

If you wish to temporarily remove a volunteer from your VAC, you can deactivate the volunteer and then reactivate the volunteer in the future. If you wish to permanently remove a volunteer from your VAC, follow the Remove a Volunteer from your VAC tutorial below instead.

1. From the **Main Menu**, click **Manage Volunteers**. Alternatively, click **Active Volunteers** in the Dashboard.
2. To deactivate volunteers:
   a. To deactivate individual volunteers: Click **Deactivate** in the volunteer's dropdown menu.
   b. To deactivate multiple volunteers: Check the boxes next to the names of the desired volunteers. Then, select **Deactivate Volunteer(s)** from the "Action" dropdown menu and click **Apply**.
3. To activate volunteers:
   Note: You can only activate volunteers that have previously been deactivated.
   a. To activate an individual volunteer: Click **Activate** in the volunteer's dropdown menu.
   b. To activate multiple volunteers: Check the boxes next to the names of the desired volunteers. Then, select **Activate Volunteer(s)** from the "Action" dropdown menu and click **Apply**.

Remove a Volunteer from your VAC

Rather than deactivating a volunteer, you may choose to permanently remove a volunteer from your VAC's account. **Removing a volunteer also deletes all of the volunteer's data (e.g., verified and unverified hours) from your VAC's account. This action cannot be undone.**

☞ Once your VAC deletes a volunteer, it will lose access to all data associated with them, including hours and contact information. Before deleting a volunteer, consider creating reports of their hours for your records.

1. From the **Main Menu**, click **Manage Volunteers**. Alternatively, click **Active Volunteers** in the Dashboard.
2. Click **Remove Volunteer** in the desired volunteer's dropdown menu.
3. Read and complete the "Confirm Delete" screen, then click **OK**.

Create and Manage Programs

VACs have the ability to add "programs" to their Fundly Connect™ accounts. Programs are used to represent recurring events or projects directed by your VAC, such as an annual day-of-service or a community clean-up. Your partner organizations can request to associate with your VAC's programs; once associated, these partners can post opportunities under the program. Programs and their associations must be actively managed by your VAC.

Create a Program

1. From the **Main Menu**, click **Configurations.**
2. Click **Programs**. A list of your VAC's programs will appear, including data regarding the number of organizations, volunteers, and hours associated with each.
3. To add a program, click **Add New Program** at the bottom right corner of the screen.
4. To inactivate this program, set the slider to **Inactive**.
5. Enter a Name for the program.
6. Select any Program Sponsors who support this program.
   Note: To select a program sponsor, it must have been previously configured by your VAC. To add a sponsor, follow the <u>Sponsors</u> section of the <u>Configurations</u> tutorial.
7. Select any Agreements that you want volunteers and/or organizations to consent to before participating in this program.
   Note: To add an agreement, follow the <u>Agreements</u> section of the <u>Configurations</u> tutorial.
8. To add a logo, click on **Click here OR Drop file here**. Select the desired document from your computer.
9. If you wish to display the program on your VAC's public site, activate the **Display on public site** slider.

10. If you wish to review organizations before they can post opportunities associated with this program, activate the **Organization approval required** slider.
    Note: If activated, review the Approve or Reject an Organization's Program Association section of the Manage Program Associations tutorial.
11. If you wish to review all opportunities associated with this program before they are accepted to the program, activate the **Opportunity approval required** slider.
    Note: If activated, review the Approve or Reject an Opportunity's Program Association section of the Manage Program Associations tutorial.
12. If you wish to review a volunteer's application before they can volunteer for an opportunity associated with this program, activate the **Volunteer application needs review for this program** slider.
    Note: If activated, review the Approve or Reject a Volunteer's Program Association section of the Manage Program Associations tutorial.
13. If you wish to display the opportunities associated with this program on your VAC's public site, activate the **Opportunities posted for the program is available on public site** slider.
14. Enter a description of the program in the "Body" field. If desired, you can use the formatting options available.
15. When done, click **Save**.
16. To edit a program: Click **Edit**. Make the desired edits, then click **Save**.
17. To delete a program: Click **Delete** in the dropdown menu, then click **OK**.

Program Level Security

After creating a program, VACs can select which users have the ability to administrate the program. If an opportunity is attached to a program, only users who have been assigned to that program will be able to see and manage the opportunity.

Note: If you want a user to manage opportunities that are attached to a program, be sure to manually assign the user to the program.

1. From the **Main Menu**, click **Configurations.**
2. Click **Program Level Security**.
3. To assign users to a program, locate the desired program. Click the "Select User(s)" field and check the box(es) next to the desired user(s). Then, click **Assign Users**.
4. Alternatively, to assign program(s) to a particular user, click the "By User" tab. Next to the desired user, click the "Select Program(s)" field and check the box(es) next to the desired program(s). Then, click **Assign Program**.
5. To delete a user or program: Click **Remove** next to the desired user or program.

Manage Program Associations

VACs are responsible for managing and policing their program associations. If your VAC activated the organization, opportunity, or volunteer approval/review required sliders when creating a program, you must approve or reject each party before it can participate in the

program. While any of your partner organizations can request to associate and post opportunities with a program, not all of these organizations or opportunities will always be relevant to the program.

👍 There is currently no notification to alert you to organizations, opportunities, or volunteers awaiting approval for a program, so it is important that your VAC regularly follows the "Approve or Reject" tutorials below to check for pending requests.

Approve or Reject an Organization's Program Association

Your VAC can approve or reject an organization's request to associate with one of your programs. Here, you can also simply view your partner organizations' program associations.

Note: If you wish to edit your settings regarding organization approval for programs, follow the Create a Program tutorial.

1. From the **Main Menu**, click **Organizations**. Alternatively, click **Active Nonprofit Organizations** in the Dashboard.
2. A list of your active partner organizations will appear. To view inactive organizations, click **Inactive** at the top of the screen.
3. Below the desired organization, click the **open icon** next to "Associated Programs" to view the organizations program associations. The selection that is highlighted in green indicates the current status of the program association.
4. To approve a program association: Click **Approved**.
5. To reject a program association: Click **Rejected**.

Add or Remove an Organization from a Program

If you wish to manually add or remove a partner organization from a program, you may do so by editing the organization's preferences.

1. From the **Main Menu**, click **Organizations**. Alternatively, click **Active Nonprofit Organizations** in the Dashboard.
2. A list of your active partner organizations will appear. To view inactive organizations, click on **Inactive** at the top of the screen.
3. Next to the name of organization that you wish to add to or remove from a program, click **Edit**.
4. Click the **Programs** tab.
5. To add the organization to a program: Check the box next to the program's name.
6. To remove the organization from a program: Uncheck the box next to the program's name.
7. When done, click Save.

Approve or Reject an Opportunity's Program Association

Just as your VAC can approve or reject an organization's request to associate with one of your programs, you can also approve or reject an individual opportunity's association with a program.

Note: If you wish to edit your settings regarding opportunity approval for programs, follow the Create a Program tutorial.

1. From the **Main Menu**, click **Partner Opportunities**. Alternatively, click **Active Partner Opportunities** in the Dashboard.
2. Below the desired opportunity, click the **open icon** next to "Associated Programs." The selection that is highlighted in green indicates the current status of the program association.
3. To approve a program association: Click **Approved**.
4. To reject a program association: Click **Rejected**.

Approve or Reject a Volunteer's Program Association

While volunteers cannot associate with a program, if your VAC activated the "Volunteer application needs review for this program" slider when creating a program, you must approve or reject each volunteer who applies for an opportunity that is associated with the program.

Note: If you wish to edit your settings regarding volunteer review for programs, follow the Create a Program tutorial.

1. From the **Main Menu** click **Partner Opportunities**.
2. Next to the desired opportunity, click **the number** that appears next to "Pending Volunteers." The "Pending Volunteers" window will open.
3. To approve a volunteer: Click **Approve**.
4. To reject a volunteer: Click **Reject** in the dropdown menu.
5. Repeat for each opportunity, if desired.

Basic Communication

VACs can communicate with both volunteers and partner organizations directly through their Fundly Connect™ accounts. Basic communication refers to a simple email containing text and attachments. If you are communicating with a large number of volunteers or organizations, or if you wish to use a template, it is recommended that you follow the Advanced Communication tutorial instead.

Send Basic Communication to Volunteers

Use one of the methods below to send basic communication to a single or small number of volunteers.

1. If you know the name(s) or email address(es) of the desired recipient(s):
    a. From the **Main Menu**, click **Communication Center**.
    b. Click **Compose**.
    c. Next to "To," select **Volunteer**.
    d. Type the name of a volunteer in the "To" field and click on their name when it appears, or enter the volunteer's email address. Continue adding volunteers, pressing **Enter** on your keyboard after each entry.

2. If you wish to search for recipient(s) using advanced criteria (e.g., City, Skill):
   a. Conduct an advanced search for the volunteers with whom you wish to communicate using steps 1-4 of the Search for Volunteers tutorial.
   b. In the list of volunteers, check the boxes next to the names of the desired volunteers.
   c. To email all of the volunteers listed, select **Send Email to All** from the "Action" dropdown menu and click **Apply**. To only email some of the volunteers listed, check the boxes next to the names of the desired volunteers. Then, select **Send Email** from the "Action" dropdown menu and click **Apply**.
3. If you wish to send basic communication to *all* of your volunteers:
   a. From the **Main Menu**, click **Manage Volunteers**.
   b. Select **Send Email to All** from the "Action" dropdown menu, then click **Apply**.
4. On the New Email page, enter CC or BCC email addresses, if desired, and a Subject for the email.
5. To add a document or image to this email, click on **Click here OR Drop file here** under "Attachments." Select the desired document from your computer.
6. If you wish to set or edit your email signature, click on **Click here to set Email Signature**. Follow the User Profile section of the My Profile tutorial for help.
   Note: This step will redirect you to a new page, resulting in a loss of your work.
7. To use an existing template for this email, select it from the "Template" dropdown menu.
   Note: Only templates saved using the method listed in step 8 below will appear in this dropdown menu.
8. To save this email as a template for future use, check the box next to "Save As Template." Then, name the template in the "Template Title" field.
9. Enter the content of your email in the "Body" field. If desired, you can use the formatting options available.
10. If you wish, you can add placeholders to the body of the email. Use placeholders to auto-populate the text with information (e.g., First Name, Total Hours Volunteered) specific to each recipient.
    a. To add a placeholder to the body of the email, place your cursor at the location in the email content where you want the placeholder to be added.
    b. Select the desired placeholder from the "Placeholder" dropdown menu, then click the **add icon**.
    c. Repeat for each additional placeholder.
11. To save your work and send the email later, click **Save As Draft**. To send now, click **Send**.
    Note: Saved drafts will appear in your "Communication History," which can be accessed using the View Outgoing Communication tutorial.

Send Basic Communication to Organizations

Use one of the methods below to send basic communication to a single or small number of organizations.

1. If you wish to communicate with a single or small number of your partner organizations:
   a. From the **Main Menu**, click **Communication Center**.
   b. Click **Compose**.
   c. Next to "To," select **Organization**.
   d. Type the name of an organization in the "To" field and click on its name when it appears, or enter the organization's email address. Continue adding organizations, pressing **Enter** on your keyboard after each entry.
   e. Continue to step 3 below.
   Alternatively:
   a. From the **Main Menu**, click **Organizations**.
   b. In the list of organizations, check the boxes next to the name(s) of the desired organization(s).
   c. Select **Send Email** from the "Action" dropdown menu, then click **Apply**.
   d. Continue to step 3 below.
2. If you wish to send basic communication to *all* of your partner organizations:
   a. From the **Main Menu**, click **Organizations**.
   b. Select **Send Email to All** from the "Action" dropdown menu, then click **Apply**.
3. To compose and send an email to your selected partner organization(s), follow steps 4-11 of the Send Basic Communication to Volunteers tutorial.

Advanced Communication

VACs can communicate with both volunteers and partner organizations directly through their Fundly Connect™ accounts. Advanced communication refers to complex forms of communication that contain more than just text, such as newsletters. This method allows you to use templates and filter recipients.

Send Advanced Communication

Use the method below to communicate with a large number of volunteers or partner organizations.

Before proceeding, consider the following options for creating advanced communication:

   a. If you wish to create a template (e.g., newsletter, volunteer appeal) that your VAC will reuse, complete both the Create a Communication Template and Populate a Communication Template tutorials before proceeding.
   b. If your communication does not require a customized template, proceed below.
   c. If you have completed this section for another piece of communication and wish to utilize the same recipient list and settings, follow the View Newsletters tutorial to create a copy of the existing piece of communication.

Setup Newsletter

This page allows you to add information about the sender and subject of the email, select a communication template, and add attachments.

1. From the **Main Menu**, click **Create New**.
   Note: To email all volunteers of a particular opportunity, click **Active Opportunities** in the Dashboard. Next to the desired opportunity, click **Communicate** in the dropdown menu. Be sure to skip the Select Recipients section below.
   Note: To email all of your partner organizations, click **Active Nonprofit Organizations** in the Dashboard. Select **Communicate to All** from the "Action" dropdown menu, then click **Apply**. Be sure to skip the Select Recipients section below.
2. Create a Name to help you identify this piece of communication (i.e. March 2016 Newsletter).
3. Enter the Sender Name, Sender Email, and a Subject for the email.
4. Select the Recipients Type for this communication.
5. Select the desired template under "Communication Template." To preview the template, click **Preview**.
   a. To communicate using a template that you have already created and populated, select it under "Communication Template." To make changes to the selected template, click **Edit Template** and use the Create a Communication Template tutorial for help.
   ***Note:* Edits made to a template are irreversible and will result in a loss of the original template.**
   b. To create and populate a template now, click **Create New Template**. Use the Create a Communication Template and Populate a Communication Template tutorials for help.
6. To add a document or image to this email, click on **Click here OR Drop file here** under "Attachment." Select the desired document from your computer.
7. Click **Save and Proceed**.

Select Recipients

To narrow down your recipient list, you must set criteria to identify users to whom the email is relevant. By default, the system will only send the newsletter to users who have added an email address and have selected email as their communication preference.

1. In the "Select Criteria" dropdown menu, select the first criteria you'd like to apply to recipients.
2. In the "Select Operator" dropdown menu, select an operator to apply to the above criteria. Operators are explained below.
   a. **Between/Not Between:** Criteria falls inside or outside a set range
   b. **Contains/Does Not Contain:** Criteria contains or does not contain a word or phrase
   c. **Ends With/Starts With:** Criteria ends or starts with a word or phrase

    d. **Greater Than/Less Than:** Criteria is "greater than" or "less than" a number, date, etc.

    e. **Greater Than Or Equal To/Less Than Or Equal To:** Criteria is "greater than or equal to" or "less than or equal to" a number, date, etc.

    f. **Is Empty/Is Not Empty:** User did or did not provide information for the criteria

    g. **Is False/Is True:** User does or does not match simple yes/no criteria

    h. **Is In The Last/Is Not In The Last:** Criteria did or did not occur in the last X number of days, weeks, months, or years

    i. **Is/Is Not:** Criteria does/does not match specific word, phrase, number, etc.

    j. **In/Not In:** Criteria does or does not match selections (useful for criteria such as cause or skill that include a list of options to select from)

3. Many criteria require that additional fields be completed. If prompted, fill in the remaining fields to complete the operator (i.e., type a word or phrase, type a number, set date(s), select dropdown items).

4. If prompted and desired, select a Grouping Option.
Note: This feature is not required and exists only for users desiring an additional level of complexity.

5. Criteria is organized into groups. To add additional criteria to this group, click the **add icon** *inside* the gray box and repeat steps 1-4. Continue adding criteria until the group is complete.

6. In the "Match" dropdown menu, select **All** to set recipients to those who match all of the criteria in this group, or select **Any** to set recipients to those who match any of the criteria in this group.

7. To add an additional group of criteria, click the **add icon** *outside* the gray box and repeat steps 1-6.
Note: Each group of criteria is considered a separate search. Users only need to match one group of criteria to be included in the recipient list.

8. The "Add Sub Group" feature will not be covered in this tutorial and exists only for users desiring an additional level of complexity.

9. When done setting all of your criteria, click **Search**.

10. Click the **# of recipient(s)** to view the names of all recipients that match your criteria. When done, click **Close**.
Note: Conducting another recipient/criteria search will override your previous search.

11. To add additional recipients, enter their email addresses under "Other Recipient(s)," pressing the "enter" key on your keyboard after each entry.
Note: Placeholders within the template will not be filled in for recipients without Fundly Connect™ accounts.

12. Click **Save and Proceed**.

Confirm

1. To preview or test this communication before sending it to your recipients, enter an email address in the "Send a Test email" field. Then, access that email address for a preview.
Note: Placeholders within the template may not be filled in for test emails.

2. To send the communication to your recipients, click **Send**.
    a. Select **Send Now** to send the communication immediately.
    b. Select **Send On** to send the communication at a later time, then select the date and time.
    c. When done, click **Send**.

Create a Communication Template

With Fundly Connect™, your VAC can create and customize templates to communicate with volunteers and partner organizations. Templates are especially useful for recurring communication purposes, such as weekly newsletters or volunteer appeals. Please note that in this section, you are only creating the template. Every time you send the template to volunteers or organizations, you will need to populate it with information using the method described in the Populate a Communication Template tutorial.

1. From the **Main Menu**, click **Communication Templates**.
2. At the bottom right corner of the screen, click **Add Template**.
3. Select one of the provided template types by clicking its **check mark(✓)**. The Add/Edit Template page will open.
4. To name this template, click the **edit button** at the top of the screen.
5. Enter a Code (a unique identifier to distinguish templates with the same name), Name, and Sub Category, if desired. Click **Save**.

Add Widgets

☝ Periodically save your work by clicking **Save** at the bottom of the widget menu. Click **Restore** to undo changes made since you last saved your work.
1. Content is added to templates in the form of widgets. Click **Widgets** at the right of the screen to access the widget menu.
2. To add a widget to the template, **click and drag the widget type** to the body of the template on the left. The contents of each widget type are explained below.
    a. **Button:** Button linking to a URL of your choice
    b. **Divider:** Horizontal line to divide sections
    c. **Image:** Image only
    d. **Image Text Button:** Image, text box, and button
    e. **Social Media:** Icons linking to your organization's social media accounts
    f. **Text:** Text box only
    g. **Two Column:** Text box that appears in two columns
3. After a widget is added to the template, an edit menu will appear at the right of the screen.
    a. To edit the widget now, follow steps 2-4 from the Edit Widgets tutorial below.
    b. To edit the widget later, click **Close** in the edit menu.
4. Continue adding widgets to the template as desired.
5. To delete a widget: Hover over it and click the **trashcan icon** in its toolbar.
6. To copy a widget: Hover over it and click the **copy icon** in its toolbar.

7. To change the order of the widgets: **Click and hold the toolbar** at the top of a widget, drag to the desired location, and release.
8. When done, continue below to begin editing.

Edit Widgets

👍 Periodically save your work by clicking **Save** at the bottom of the widget menu. Click **Restore** to undo changes made since you last saved your work.

1. To edit a widget that has already been added to the template, hover over it and click the **edit icon** in its toolbar.
2. Each widget type has different formatting options. The following options appear in the edit menu's "Content" tab for various widgets.
   a. **Button Align:** Align button to the left, center, right, or default
   b. **Button Link:** Enter the URL you wish a button to link to
   c. **Button Text:** Enter the text you wish a button to display (e.g., Read More, Register)
   d. **Facebook/Linked In/Twitter:** Add URLs that link to social media accounts
   e. **Image:** Add an image from your computer and edit it with the "Photo Editor" window
   f. **Image Align:** Align image to the left, center, right, or default
   g. **Image Alter Text:** Enter the text you wish to appear in place of an image that doesn't load
   h. **Image Height/Width:** Adjust the height and width of an image
   i. **Image Link:** Enter the URL you wish an image to link to
   j. **Left/Right Column Width:** Adjust the left and right column width
   k. **Left/Right Content:** Enter and format the text to appear in the left & right text columns; Use placeholders to auto-populate the text with information specific to each recipient
   l. **Swipe Column:** Affects formatting on mobile devices
   m. **Text Content Align:** Align text to the left, center, right, or default
   n. **Text Content:** Enter and format the text to appear in the text box; Use placeholders to auto-populate the text with information specific to each recipient
3. The following options appear in the edit menu's "Style" tab for various widgets.
   a. **Align:** Align content to the left, center, or right, or justify
   b. **Background Color:** Set the color to appear in the background of an image or text
   c. **Border Color:** Set the color of a border or divider
   d. **Border Style:** Set a border or divider as solid, dotted, dashed, or none (remove)
   e. **Bottom/Top/Left/Right Space:** Adjust the amount of space around the text in a button
   f. **Border Width:** Adjust the width of a border or divider
   g. **Corners Radius:** Adjust the roundness of a button's corners
   h. **Font:** Set the font of text
   i. **Font Color:** Set the color of text

j. **Font Size:** Adjust the size of text
k. **Height:** Adjust the height of an image
l. **Margin:** Adjust the amount of space around a button
m. **Padding:** Adjust the amount of space around content
n. **Width:** Adjust the width of an image
4. When done editing a widget, click **Close** in the widget edit menu.

Edit Layout

1. To edit the layout of the template, click **Layout** at the right of the screen.
2. Set the layout for the frame, including background color, width, and border preferences.
3. Set the layout for the page, including background color and font preferences.
4. When you are done creating this template, click **Save**.
5. To return to your list of communication templates, click the **return icon**.

Populate a Communication Template

Once your VAC has created a template using the <u>Create a Communication Template</u> tutorial, you can create a copy of it to populate with information before sending to volunteers or partner organizations. When you are done populating the template, you can send it using the <u>Send Advanced Communication</u> tutorial.

1. From the **Main Menu**, click **Communication Templates**.
2. Hover over the template you wish to use and click the **copy icon** to create a duplicate. *Note:* **If you do not create a duplicate of the template, all changes will be made to the original template and will result in a loss of the original template.**
3. The Add/Edit page of the template's copy will appear.
4. To name this template, click the **edit button** at the top of the screen.
5. Enter a Code (a unique identifier to distinguish templates with the same name), Name, and Sub Category, if desired. Click **Save**.
6. Follow the <u>Edit Widgets</u> tutorial to populate the template with text, images, and URLs.
7. When done, click **Save**.

Create and Manage Invites

As a VAC, you are able to create and send invites to solicit volunteers and teams to participate in one of your opportunities. These invites are created using preexisting Fundly Connect™ templates. After an invite is sent, you can view email analytics and track recipients' responses.

Note: Invites are not included in your "Communication History."

Create an Invite

1. From the **Main Menu**, click **Our Opportunities**. Alternatively, click **Active Opportunities** in the Dashboard.
2. Click on **the name of the opportunity** for which you wish to send an invite.
3. On the left of the screen, click **Invites**.

4. To create an invite, click **Create Invite** at the bottom right corner of the screen. The invite "Setup" page will open.
5. By checking the **Track not attending responses** box, recipients who choose not to attend the invite will be required to provide a reason for not attending.
6. Enter the Sender Name, Sender Email, and a Subject for the invite.
   Note: The Sender Email should be one that is associated with your organization. This will enable you to receive all replies.
7. Under "Invite Template," select the template you wish to use for this invite. To preview a template, click **Preview**.
   a. If you have previously created an invite template that you wish to use now, select it from the "Select Template" field. To make changes to the template, click **Edit Template** and skip to step 9 below. To continue without making edits, skip to step 21 below.
      Note: Edits made to a template are irreversible and will result in a loss of the original template.
      Note: Invite templates can also be created and managed from your Communication Center. From the **Main Menu**, click **Communication Templates**. Then, on the left of the screen, click **Invite** in the dropdown menu.
   b. If you have no existing templates or wish to create a new template, click **Create New Template** and continue below.
8. Select one of the provided template types by clicking its **check mark(✓)**. The Add/Edit Template page will open.
9. To name this template, click the **edit button** at the top of the screen.
10. Enter a Code (a unique identifier to distinguish templates with the same name), Name, and Sub Category, if desired. Click **Save**.
11. The invite template is displayed on the left of the screen and is already populated with default content.
   a. Most invite templates include only text. For these templates, continue below.
   b. Some templates include additional content, such as images. For these templates, continue below and reference the Add Widgets, Edit Widgets, and Edit Layout sections of the Create a Communication Template tutorial for help working with other content types, styles, and layout.
12. To edit the text, hover over it and click the **edit icon** in its toolbar. An edit menu will appear at the right of the screen.
13. Enter and format the text to appear in the text box. Use placeholders to auto-populate the text with information specific to each recipient. When done, click **Close**.
14. Content is added to templates in the form of widgets. If you wish to add an additional text box to the template, click **Widgets** at the right of the screen to access the widget menu. To add a widget to the template, **click and drag the widget type** to the body of the template on the left.
15. After a widget is added to the template, an edit menu will appear at the right of the screen. Repeat step 13 above to edit the text.
16. Continue adding widgets to the template as desired.

17. To delete a widget: Hover over it and click the **trashcan icon** in its toolbar.
18. To copy a widget: Hover over it and click the **copy icon** in its toolbar.
19. To change the order of the widgets: **Click and hold the toolbar** at the top of a widget, drag to the desired location, and release.
20. When you are done creating this template, click **Save**. You will be returned to the invite Setup page.
21. To preview or test this communication before sending it to your recipients, check the **Send Test Email** box and enter an email address. Then, access that email address for a preview.
    Note: Placeholders within the template may not be filled in for test emails.
22. When done, click **Save And Next**.
23. The "Select Invites" page will open, allowing you to create the recipient list for this invite.
    Note: While the steps below demonstrate how to add a volunteer as a recipient, you may also add a team.
24. To add an individual volunteer: In the "Choose Volunteer or Team" field, type the name of the desired volunteer or team.
    a. If the volunteer exists in the system, their name will appear. Click on the volunteer's name, then click the **add icon**.
    b. If the volunteer does not exist in the system, press **Enter** on your keyboard. A window will open allowing you to manually enter the volunteer. If you wish to create a user account for the volunteer, set the slider to **Yes**; the volunteer will receive an account set-up email. Enter the volunteer's First and Last Names, Email, and Mobile Phone number, then click **Save**. When the window closes, click the **add icon** next to the volunteer's name.
25. To add multiple volunteers: Click **Advanced Search**. Follow steps 1-8 from the Select Recipients section of the Send Advanced Communication tutorial. When done, click **Add to List**.
26. To delete a recipient from the invite list, click **Delete** next to the desired name, then click **OK**.
27. When done creating your recipient list, click **Next**.
28. The "Send" page will open. To send the invite now, check the **Send Now** box. To send the invite at a later date, check the **Send On** box, then select the date and time you wish to send the invite.
29. When done, click **Save**.

Manage Invites

After creating and sending an invite, you can track the activity of its recipients, such as whether they have opened, accepted, or declined the invite. You can also use this section to complete drafts or make copies of invites.

1. From the **Main Menu**, click **Our Opportunities**. Alternatively, click **Active Opportunities** in the Dashboard.
2. Click on **the name of the opportunity** for which you have sent an invite.
3. On the left of the screen, click **Invites**.

4. The "Invites" page will open, displaying details and analytics about past and current invites.
5. To view incomplete invites: Click the **Draft** tab.
    a. To edit or complete an invite: Click **Edit**.
    b. To delete an invite: Click **Delete**, then click **OK**.
6. To view completed invites: Click the **Processing** tab.
    a. To view details for an invite: Click **View**. A list of analytics, including open, click, and attendance rates, will appear; you may click on each item to see more detail. A list of each recipient and their individual activity will also appear.
    b. To copy an invite: Click **Copy** in its dropdown menu. Be sure to create a new subject name if you wish to distinguish it from the original.

    👍 This is a helpful shortcut when you wish to use an existing invite as the base for a new invite. Doing so allows you to utilize the original invite's recipient list and settings.
    Note: The copied invite utilizes the same recipient list as the original invite. While you cannot delete any existing recipients, you can add recipients by following steps 22-27 of the Create an Invite tutorial above.

View Communication History

Your inbox and communication history allows you to track the messages you have sent and received. Here, you can compose, reply to, and review messages, as well as view email analytics.

View and Reply to Incoming Communication

1. Click **Inbox** at the top of the screen. Alternatively, from the **Main Menu**, click **Communication Center**.
   Note: The number listed next to "Inbox" indicates new or unopened incoming communication.
2. A list of all incoming communication will appear in the "Inbox" tab.
3. To search for specific communication: Enter keywords in the search field and/or enter a date range in the From/To fields, then click **Filter**.
4. To review an email: Click on the email in the pane at the left of the screen. It will appear in the right pane.
5. To reply to an email: Click on the desired email. Then, click **Reply**, compose the email, and click **Send**.

View Outgoing Communication

1. Click **Inbox** at the top of the screen. Alternatively, from the **Main Menu**, click **Communication Center**.
2. To view all outgoing communication, including drafts, click the **Communication History** tab.
3. To search for specific communication: Enter keywords in the search field and/or enter a date range in the From/To fields, then click **Filter**.
4. To review an email: Click **Summary** next to the desired email. A list of email analytics, including open and click rates, will appear.
5. To view details about email analytics: Hover over the **Activity** tab and click the desired activity.
6. To view the content of the email: Click **Preview**.
7. To edit or complete a newsletter: Click **Edit** next to the desired newsletter. Follow the Send Advanced Communication tutorial to edit.
8. To edit or complete an email: Click **Edit** next to the desired email. Follow the Send Basic Communication to Volunteers tutorial to edit.

View Newsletters

While newsletters appear in your list of outgoing communication, you can also access a list of communication that contains only newsletters.

1. From the **Main Menu**, click **Newsletter**.
2. A list of all saved and sent newsletters will appear. "In Process" indicates a newsletter that is currently being processed. "Completed" indicates a newsletter that has been successfully sent. "Saved Only" indicates a newsletter that has been saved but not sent.
3. To copy a newsletter: Click **Copy** in its dropdown menu.

   ☝ This is a helpful shortcut when you wish to use an existing newsletter as the base for a new newsletter. Doing so allows you to utilize the newsletter's recipient list and settings.
   a. The "Setup Newsletter" page will open.
   b. To save and send the copy later: Enter a new Subject to distinguish this piece of communication, then click **Save**. The copy will appear in your Newsletter List.
   c. To edit and send the copy now: Refer to the Send Advanced Communication tutorial for help composing and sending the copied newsletter, skipping sections that you do not wish to alter (e.g. "Select Recipients").
   Note: **When editing the copied newsletter, edits made to the template are irreversible and will result in a loss of the original template.** If you do not want to lose this template, you can create a new template/newsletter by completing the Create a Communication Template and/or Populate a Communication Template tutorials**.**

4. To edit and/or send a saved newsletter: Click **Edit** next to the desired newsletter. Refer to the Send Advanced Communication tutorial for help editing and/or sending the newsletter.
5. To review a sent newsletter: Click **View Summary** in its dropdown menu. Refer to the View Outgoing Communication tutorial above for help navigating the summary page.
6. To delete a newsletter: Click **Delete** in its dropdown menu, then click **OK**.

Managing Volunteer Coordinators

To facilitate the management of your Fundly Connect™ account, your VAC can create and assign volunteer coordinators. A volunteer coordinator is assigned to an opportunity to help manage its volunteers. While volunteer coordinators can log and verify hours, schedule, and communicate with volunteers, they cannot modify the account settings or configurations of the organization.

Assign a Volunteer Coordinator to an Opportunity

If the individual you would like to assign as a volunteer coordinator already has a volunteer account with Fundly Connect™, follow the steps below.

1. From the **Main Menu**, click **Volunteer Coordinators**.
2. At the top right corner of the screen, click **Assign Coordinator**.
3. Select the Opportunity and Venue you wish to assign the volunteer coordinator to manage.
4. To assign a volunteer, set the slider to **Volunteer**. Then, type the name of the individual you wish to assign in the "Choose Volunteer" field and click on their name when it appears.
5. To assign a user, set the slider to **User**. Then, select the user you wish to assign in the "Select User" field.
6. Click **Assign**.

Create a Volunteer Coordinator Account

If the individual you would like to assign as a volunteer coordinator does not have a Fundly Connect™ account, follow the steps below.

1. From the **Main Menu**, click **Volunteer Coordinators**.
2. At the bottom right corner of the screen, click **Create New Coordinator**.
3. Create a Username, enter the coordinator's First and Last Name, and enter the coordinator's Email address. An email with a password will be sent to this email address to allow the volunteer coordinator to log in to the account.
4. Click **Save**.
5. Once the account it created, you may assign this volunteer coordinator to an opportunity by following the steps above in Assign a Volunteer Coordinator to an Opportunity.

Remove an Existing Volunteer Coordinator

1. From the **Main Menu**, click **Volunteer Coordinators**.
2. Find the volunteer coordinator you wish to remove.
   Note: To sort coordinators by opportunity, click the **Opportunity View for Volunteer Coordinators** tab.
3. Under the coordinator's name, find the opportunity from which you wish to remove the coordinator.
4. Next to the opportunity, click **Remove** in the dropdown menu.

Substitute an Existing Volunteer Coordinator

1. From the **Main Menu**, click **Volunteer Coordinators**.
2. Find the volunteer coordinator you wish to substitute.
   Note: To sort coordinators by opportunity, click the **Opportunity View for Volunteer Coordinators** tab.
3. Under the coordinator's name, find the opportunity from which you wish to remove the coordinator.
4. To substitute with a volunteer, set the slider to **Volunteer**. Then, type the name of the individual you wish to assign in the "Choose Volunteer" field and click on their name when it appears.
5. To substitute with a user, set the slider to **User**. Then, select the user you wish to assign in the "Select User" field.
6. Click **Substitute** to make the change.

Using a Volunteer Coordinator Account

Once a VAC has assigned a volunteer or user as a volunteer coordinator of an opportunity, that individual can begin performing the functions of a coordinator. A volunteer coordinator's account looks similar to a volunteer's account, but has some of the added features of an organization's account. The sections below are intended for use by volunteer coordinators.

Access your Volunteer Coordinator Account

1. Log in to your volunteer or user Fundly Connect™ account.
2. Click on the **account menu** at the top of the screen, then click **Volunteer Coordinator View** in the dropdown menu.
3. You may be required to choose an organization if you are assigned as a coordinator to more than one opportunity of different organizations.
4. Your "Coordinator Dashboard" will open.

Navigate your Volunteer Coordinator Account

The Coordinator Dashboard

The Coordinator Dashboard is the main page and hub of all of your activity as a volunteer coordinator on Fundly Connect™.

In the Dashboard, you will see the following:

Volunteers
- When clicked, displays volunteer list where you can access records

Teams
- When clicked, displays team list where you can access records

Opportunities
- When clicked, displays opportunities of the organization you manage

Verified Hours
- Displays total verified hours of volunteers

Unverified Hours
- Displays total unverified hours of volunteers

The Main Menu

To access other areas of the Fundly Connect™ site, use the Main Menu. To access it, click the **Main Menu** icon at the top right of the screen.

In the Main Menu, you will see the following:

Dashboard
- Return to the Dashboard

Coordinator Calendar
- View the opportunities that you manage for this organization in a calendar view

Manage Opportunities
- View the opportunities that you manage for this organization

Volunteers / Teams
- View the list of volunteers and teams where you can access records

Quick Assign and Schedule Volunteers (VACs only)
- View the opportunities that you manage for this organization

Mass Schedule Changes (VACs only)
- View the list of volunteers and teams where you can access records

The Quick Menu

The Quick Menu always appears at the top of the screen. It provides quick access to some helpful tools in Fundly Connect™. In the Quick Menu, you will see the following:

Icon	Icon Name	Function
⊕	Add	Add hours

	Recent Volunteers	See list of volunteers you have recently viewed
	Recent Visits	See list of recent pages you have visited in Fundly

Assign Volunteers to an Opportunity

Though volunteers typically apply for opportunities themselves, you can also assign them to opportunities.

Assign an Individual Volunteer

Use this tutorial to assign one volunteer to an opportunity. You may also use this method to assign a team to an opportunity.

1. From the **Main Menu**, click **Manage Opportunities**.
2. Next to the desired opportunity, click **Assign Volunteer** in the dropdown menu.
3. In the "Choose Volunteer or Team" field, type the name of the desired volunteer or team.
   Note: While the steps below demonstrate how to add a volunteer to an opportunity, you may also add a team.
   a. If the volunteer exists in the system, their name will appear. Click on the volunteer's name.
   b. If the volunteer does not exist in the system, press **Enter** on your keyboard. A window will open allowing you to manually enter the volunteer. If you wish to create a user account for the volunteer, set the slider to **Yes**; the volunteer will receive an account set-up email. Enter the volunteer's First and Last Names, Email, and Mobile Phone number. Then, click **Save**.
4. Click **Assign Volunteer**. When the process is complete, click **Close**.

Assign Multiple Volunteers Using Quick Assign and Schedule

Use this tutorial to assign multiple volunteers to an opportunity at the same time using the "Quick Assign and Schedule" feature. This method also allows you to create "configurations" for volunteer assignments, where you can preset details such as opportunity location, shift, and dates to use again for future quick assigns.

Note: This section applies only to a VAC's opportunities.

1. From the **Main Menu**, click **Quick Assign and Schedule**.
2. Select an Opportunity from the "Select Opportunity" dropdown menu.
3. If you have previously set up a configuration for this opportunity that you wish to use, click **Assign Volunteer** in its dropdown menu and skip to step 10.
   Note: To edit a configuration, click **Edit** in its dropdown menu.
4. Create a Configuration Name.
   Note: A configuration allows you to save these settings to use for future quick assigns.
5. Select a Location, Shift, and Position.
6. Select a From Time and To Time.

7. Select a Start Date. Then select the date(s) to which you wish to quick assign volunteers from the Availability dropdown menu.
    Note: If your desired availability dates do not appear, select a start date that is closer in proximity.
    Note: If you wish to select additional dates, you may have to set up an additional configuration and complete this tutorial again.
8. Select how you would like to proceed if the schedule you selected has already reached its full capacity of volunteers.
    a. Do not assign: Do not assign volunteer(s) to any dates
    b. Proceed anyway: Assign volunteer(s) to all dates, regardless of full capacity
    c. Add to available dates: Assign volunteer(s) to the dates that are still available
9. When done, click **Save and Next.**
10. If you wish to change the Configuration you are using, select it from the dropdown menu.
11. Enter the No. Of Volunteer(s) that you wish to quick assign to the opportunity. Click anywhere on the screen to activate your selection.
12. Under "Assign Volunteer," an entry space will appear for each volunteer you wish to assign.
13. The Location, Shift, Position, From Time, To Time, Start Date..., and Availability dates will default to the configuration's settings for each volunteer . If you wish to change any of these settings for a volunteer, you may do so using the fields provided.
14. In the "Choose Volunteer" field, type the name of the desired volunteer.
    a. If the volunteer exists in the system, their name will appear. Click on the volunteer's name to assign them.
    b. If the volunteer does not exist in the system, press **Enter** on your keyboard. A window will open allowing you to enter the volunteer into the Fundly Connect™ system. If you wish to create a user account for the volunteer, set the slider to **Yes**; the volunteer will receive an account set-up email. Enter the volunteer's First and Last Names, Email, and Mobile Phone number. Then, click **Save**.
15. Repeat steps 13-14 for each volunteer. When done, click **Save**.

View all Volunteers of an Opportunity

1. From the **Main Menu**, click **Manage Opportunities**.
2. Next to the desired opportunity, select **Manage Volunteers**. A list of all of the opportunity's volunteers will appear.

Remove a Volunteer from an Opportunity

To remove an applicant from an opportunity, follow the steps below.

1. From the **Main Menu**, click **Manage Opportunities**.
2. Next to the desired opportunity, click **Manage Volunteers**.
3. Next to the desired volunteer, click **Remove Volunteer**, then click **OK**.

👍 If the applicant is unaware that they are being removed from an opportunity, follow up with a phone call or email to let them know.

Schedule a Volunteer

Before a volunteer can log hours for an opportunity, their shift and schedule must be set. Volunteers may do this on their own, or you may do it for them.

👍 It is recommended that you allow volunteers to set their own schedules. If you decide to set volunteers' schedules, be sure to discuss their availability with them first.

For all scheduling aside from "Mass Schedule Changes", begin in the **Main Menu** and click **Manage Opportunities**. Then, next to the desired opportunity, click **Manage Volunteers**.

Create a Schedule

1. Next to the desired volunteer, click **Scheduling** in the "Next Step" column.
   Note: If the volunteer has set their own schedule, "Log Hours" will appear. Click **View Schedule** in the dropdown menu to view the schedule.
2. Select the Venue, Shift, and Position to which you are assigning the volunteer.
   Note: By default, you can only select from venues and shifts associated with your VAC's active opportunities. To include venues and shifts from inactive opportunities as well, check the "Select from all Location(s) and Shift(s)" box.
3. Fill in the remaining fields, including From/Till Dates and From/Till Times.
   Note: The remaining scheduling options may differ based on how you originally set up the schedule for this opportunity.
4. Click **Save**, then click **Close**.

Create Multiple Schedules for a Single Volunteer

Sometimes, a volunteer has more than one shift or position that you need to schedule, or the volunteer has differing schedules for different days of the week. In cases like these, you can set multiple schedules.

1. Next to the desired volunteer, click **Add Schedule** in the dropdown menu.
2. Follow steps 2-3 from the "Create a Schedule" tutorial above.
3. If you are done scheduling for this volunteer, click **Save** and **Close**. If you wish to create another schedule, click **Save & Add New**. Set the new schedule, then click **Save** and **Close**.

Make Mass Schedule Changes

To change the schedule of multiple volunteers who are scheduled for the same opportunity and shift, Fundly Connect™ features a Mass Schedule Change tool.

Note: This section applies only to a VAC's opportunities.

1. From the **Main Menu**, click **Mass Schedule Changes**.
2. Enter the date or date range for which you wish to make a schedule change.

3. To locate the desired opportunity, begin typing its name. When the full name of the opportunity appears, click on it.
   Note: Only advanced opportunities are eligible for mass schedule changes.
4. Select the desired Location, Shift, and Position, then click **Find**.
5. A list of volunteers who match the selected schedule will appear. Check the boxes next to the volunteers whose schedule you wish to change, then click **Change Schedule**.
6. To create the new schedule, follow steps 2-3 from the "Create a Schedule" tutorial above.
7. When done, click **Save**.
8. To view a history of your previous mass schedule changes, click **History** at the top right corner of the screen.

Edit or Delete a Schedule

1. Next to the desired volunteer, click **View Schedule** in the dropdown menu.
2. To edit a schedule: Click **Edit**. Follow steps 2-4 from the "Create a Schedule" tutorial above.
3. To delete a schedule: Click **Delete** in its dropdown menu, then click **OK**.

Log or Verify Hours for a Volunteer

Once a volunteer has been scheduled, they can begin logging their hours. Organizations or volunteer coordinators must verify hours logged by volunteers, or they can log hours for volunteers using one of the methods below.

Verify Hours Logged by a Volunteer

If you choose to have volunteers log their own hours, you must verify their hours.

1. From the **Main Menu** click **Manage Opportunities**.
2. Next to the desired opportunity, click **Manage Volunteers**.
3. For volunteers with unverified hours, there will be an amount listed in the "Unverified Hours" column. To review these hours, click **the number** in the column.
4. To approve a time log entry, click **Approve**. To reject a time log entry, click **Reject** in the dropdown menu, enter a reason, and click **Reject**.

Log Hours Manually

1. From the **Main Menu** click **Manage Opportunities**.
2. Next to the desired opportunity, click **Manage Volunteers**.
3. Next to the desired volunteer, click **Log Hours** in the "Next Step" column.
   Note: If the volunteer has not set a schedule for this opportunity, "Scheduling" will appear.
4. Select the volunteer's assignment.
5. Next to the desired date(s), enter the number of hours worked and a description of the work.
6. Click **Save & Close**.

Log Hours Using the Quick Log Tool

To log hours for an event or a volunteer in bulk, use the "Quick Log Hours" tool.

1. Click the **add icon** in the Quick Menu, then click **Add Hours**.
2. Select or enter the desired opportunity.
3. To narrow down the list of volunteers for whom you are logging hours, select a location, shift, and position. To search for a particular volunteer, enter the volunteer's name. Click **Filter**.
4. Enter the From/To Dates for which you are logging hours, and enter a description of the work.
5. In the "Log Hours" column next to each volunteer, enter the total number of hours worked during the entire duration of the dates selected above.
6. Click **Save**.

Log Hours Using the Attendance Tool

To log hours by indicating whether a volunteer attended their scheduled shift, use the "Attendance" tool.

1. From the **Main Menu**, click **Manage Opportunities**.
2. Next to the desired opportunity, click **Manage Volunteers**.
3. On the left of the screen, click **Attendance**.
4. Select the desired date, then click **Get Attendees**.
5. Next to each volunteer who attended their shift on the selected date, click **Check In**. If the volunteer did not attend, click **No Show** in the dropdown menu. Hours that are checked in are automatically counted as verified hours.
6. Repeat steps 4-5 above for each desired date.

Communicate with Volunteers

Volunteer coordinators can email volunteers and view communication history and email analytics directly through their Fundly Connect™ accounts.

Email Volunteers

1. From the **Main Menu**, click **Volunteers / Teams**. Alternatively, if you manage multiple opportunities and wish to email only volunteers of a single opportunity, from the **Main Menu** click **Manage Opportunities**. Next to the desired opportunity, click **Manage Volunteers** and proceed below.
2. To communicate with an individual volunteer: Click on the email address below the name of the desired volunteer. Proceed to step 4.
3. To communicate with multiple volunteers: To email all of the volunteers listed, select **Send Email to All** from the "Action" dropdown menu and click **Apply**. To only email some of the volunteers listed, check the boxes next to the names of the desired volunteers. Then, select **Send Email** from the "Action" dropdown menu and click **Apply**.
4. On the New Email page, enter CC or BCC email addresses, if desired, and a Subject for the email.

5. To add a document or image to this email, click on **Click here OR Drop file here** under "Attachments." Select the desired document from your computer.
6. To use an existing template for this email, select it from the "Template" dropdown menu. *Note:* Only templates previously saved using the method listed in step 7 below will appear in this dropdown menu.
7. To save this email as a template for future use, check the box next to "Save As Template." Then, name the template in the "Template Title" field.
8. Enter the content of your email in the "Body" field. If desired, you can use the formatting options available.
9. If you wish, you can add placeholders to the body of the email. Use placeholders to auto-populate the text with information (e.g., First Name, Total Hours Volunteered) specific to each recipient.
   a. To add a placeholder to the body of the email, place your cursor at the location in the email content where you want the placeholder to be added.
   b. Select the desired placeholder from the "Placeholder" dropdown menu, then click the **add icon**.
   c. Repeat for each additional placeholder.
10. To save your work and send the email later, click **Save As Draft**. To send now, click **Send**.

View Communication History

Your inbox and communication history allows you to track the messages you have sent and received as a volunteer coordinator. Here, you can compose, reply to, and review messages, as well as view email analytics.

1. Click **Inbox** at the top of the screen. A list of all incoming communication will appear. *Note:* The number listed next to "Inbox" indicates new or unopened incoming communication.
   a. To search for specific communication: Enter keywords in the search field and/or enter a date range in the From/To fields, then click **Filter**.
   b. To review an email: Click on the email in the pane at the left of the screen. It will appear in the right pane.
   c. To reply to an email: Click **Reply**, compose the email, and click **Send**.
   d. To compose a new email: Click **Compose,** compose the email, and click **Send**. Refer to the "Email Volunteers" section above for help composing an email.
2. To view all outgoing communication, click the **Communication History** tab from your inbox.
   a. To search for specific communication: Enter keywords in the search field and/or enter a date range in the From/To fields, then click **Filter**.
   b. To review an email: Click **Summary** next to the desired email. A list of email analytics, including open and click rates, will appear.
   c. To view details about email analytics: Hover over the **Activity** tab and click the desired activity.
   d. To view the content of the email: Click **Preview**.

View and Edit a Volunteer's Profile

All of a volunteer's activities (e.g., trainings, hours) and account information (e.g., contact information, causes) can be found on their volunteer profile. Volunteer coordinators can edit a volunteer's profile.

👍 A volunteer's profile includes their personal preferences and information. Do not edit a volunteer's profile unless they request your help or you need to add information for administrative purposes.

1. From the **Main Menu**, click **Volunteers / Teams**. Alternatively, click **Volunteers** in the Dashboard.
2. To view a volunteer's profile, click on their name.
3. To edit the volunteer's information, click **Edit Volunteer**.
4. Make the desired changes, then click **Save and Next**.
5. When done, click **View Volunteer** to return to the volunteer's profile.

Application Forms

Your organization may require that volunteers fill out an application form when they apply to an opportunity. Application forms can be added to opportunities when they are created, or added later by editing the opportunity. To create specialized fields to add to your forms, follow the Custom Datasets section of the Configurations tutorial before proceeding.

Create an Application Form

1. From the **Main Menu**, click **Design Application Form**.
2. At the bottom right corner of the screen, click **Add New Form**.
3. In the "Volunteer Application Form" screen, create a name for the form.
4. In the "Add Field" dropdown menu, click on a field to add it to your form. Add fields in the order that you wish for them to appear.
5. To edit a field: Click the **edit icon**. Here, you may change the field's label, make it a required section, and give users further guidelines or instructions.
6. To delete a field: Click the **remove icon**.
7. When finished designing the form, click **Save**.

Manage Application Forms

1. From the **Main Menu**, click **Design Application Form**.
2. To delete an application form: Click **Delete** in its dropdown menu, then click **OK**.
3. To edit an application form: Click **Edit**. Follow steps 3-7 from the Create an Application Form tutorial above to edit.

4. To copy an application form: Click **Copy** in its dropdown menu. Create a new name, if desired, then click **Proceed**.

Training Sessions

If your organization requires volunteers to attend orientation or training sessions, you can use your Fundly Connect™ account to organize these sessions.

👍 Orientation and training sessions are typically used directly by nonprofit partner organizations for volunteers of their own opportunities, not by VACs. However, VACs may also use these sessions for volunteers of their own opportunities or as a service to partner organizations.

Create a Training Session

You must first create your orientation or training session on Fundly Connect™. Then, refer to the Create a Basic Opportunity tutorial to learn how to add it as a requirement for your opportunity. Fundly does not distinguish between training and orientation sessions, so follow the steps below for both.

1. From the **Main Menu**, click **Orientations & Trainings**.
2. At the bottom right corner of the screen, click **Add Training**.
3. Keep the slider at the top of the screen set to **Active**.
4. Enter the name of the training session and its maximum capacity.
5. If you want to allow volunteers to cancel their session, set the **Allow RSVP...** slider to "Yes."
    Note: This feature is best for orientation sessions for which an exact count is not necessary (e.g., large orientation sessions).
6. If the training session will not take place at the address listed, click **Edit**. Enter a Title and Address (click **Can't find your location?** if address fields do not appear), then click **Save**. Or, if the session will be offered at multiple locations, click **Add Location**, enter a Title and Address, then click **Save**.
7. Enter Training Details for the session. Include details about what information will be covered and why volunteers must attend.
8. Click **Save & Next**.
9. In the "Schedule for" dropdown, select the location to which this schedule applies.
10. Select one of the following as the basis of your scheduling:
    a. **One Time:** One day event
    b. **Weekly:** On a weekly basis
    c. **Monthly:** On a monthly basis
    d. **Ongoing:** Multiple day event or ongoing opportunity
    e. **Other:** Untraditional schedules occurring on random dates
11. Set a date(s) or date range.

12. If applicable, select the days of the week and/or days of the month when this schedule will occur.
13. Under "Date Exceptions," enter any dates or date ranges during which this schedule does not apply, then click the **add icon**.
14. To complete this schedule, click **Save**.
15. The "Add/Edit Shift" window will open, allowing you to set a shift (i.e., start and end time) for this session.
    a. Enter a Shift Name.
    b. If applicable, select the Shift Day(s) to which this schedule applies.
    c. Set the Start and End Times. If volunteers can attend the session based on their own availability, leave Start and End Times blank and activate the **Flexible Time** slider.
    d. If you are done, click **Save**. If you would like to set an additional shift for this schedule, click **Save And Add New** and repeat the above process.
       12. Set a second shift when you would like to offer the same training session twice in one day, set different shift times for different days of the week, etc.
16. To set an additional schedule, repeat steps 9-15 above.
17. To edit a schedule: Click **Edit** next to the desired schedule. Use the tools on the left of the screen to make desired edits, then click **Save**.
18. To delete a schedule: Click **Delete** in its dropdown menu, then click **OK**.
19. When done setting schedules, click **Save**, then click **Next**.
20. The training session is now available to your organization. To make it available to your VAC as well, check the box next to the name of the VAC and click **Publish/Unpublish to Action Center**.

Assign a Volunteer to a Training Session

While volunteers will be prompted to schedule themselves for required training sessions when applying for an opportunity, you can also manually assign volunteers to training sessions. This tool is helpful if you want to assign current volunteers to additional training, assign individual volunteers to specialized training based on job function, etc.

Note: A VAC cannot manage the training sessions of its partner organizations. However, a VAC can assign a volunteer to a partner organization's training session if a "Pending Orientation & Training" status appears for the volunteer on the opportunity's "Manage Volunteer" page. To assign the volunteer, click on **Pending Orientation & Training** and follow steps 3 and 5 below.

1. From the **Main Menu**, click **Orientations & Trainings**.
2. Next to the desired training name, click **Add RSVP** in the dropdown menu. Alternatively, click **Calendar View**, locate the desired session, click the **add icon** next to "RSVPs," and proceed to step 4.
3. Select the Location, Shift, and Date of the session.
4. Select the volunteer(s) you want to assign to this training session. Use the search field if desired.
5. Click **Save**.

Mark Attendance for a Training Session

You must manually mark a volunteer's attendance to an orientation or training session.

👍 Fundly Connect™ does not allow volunteers to schedule or log hours until they have been marked as attended for all scheduled training. Complete this step as soon as possible after a scheduled training session to allow volunteers to begin scheduling.

Note: A VAC cannot manage the training sessions of its partner organizations. However, a VAC can mark a volunteer's attendance for a partner organization's training session if a "Pending Attendance" status appears for the volunteer on the opportunity's "Manage Volunteer" page. To mark attendance for the volunteer, click on **Pending Attendance** and follow steps 4-5 below.

1. From the **Main Menu**, click **Orientations & Trainings**.
2. Next to the desired training name, click **View RSVP** in the dropdown menu. Alternatively, click **Calendar View**, locate the desired session, click **the number** that appears next to "RSVPs", and proceed to step 4.
3. Select the Location, Shift, and Date of the session. A list of all attendees for the selected session will appear.
4. To mark a volunteer as having attended the session, set the slider under the "Attended" column to "Yes."
5. When done, click **Save**.

View Attendees for a Training Session

1. From the **Main Menu**, click **Orientations & Trainings**.
2. Next to the desired training name, click **View RSVP** in the dropdown menu. Alternatively, click **Calendar View**, locate the desired session, click **the number** that appears next to "RSVPs", and proceed to step 4.
3. Select the Location, Shift, and Date of the session. A list of all attendees for the selected session will appear.
4. To remove a volunteer from the session, click the **remove icon** next to the volunteer's name, then click **OK**.
5. When done, click **Save**.

Delete a Training Session

1. From the **Main Menu**, click **Orientations & Trainings**.
2. Next to the desired training session, click **Delete** in the dropdown menu, then click **OK**.

Verified Volunteers ♦

The screening process and tracking of volunteers is easier with Verified Volunteers and Fundly Connect™ integration. You will initiate the background check from Fundly Connect™ which will submit a request to Verified Volunteers.

♦ Integration with Verified Volunteers is an add-on feature on Fundly Connect™.

Set up Verified Volunteers Integration

1. From the **Main Menu**, click **Verified Volunteers.**
2. To enable the Verified Volunteers integration, enter the username and password provided by Verified Volunteers on account setup.
3. Enter the screening package ID and description.
4. If you don't have an existing account with Verified Volunteers, click on the **click here** link to request to create a Verified Volunteers account.
5. Fill in your organization name, first name, last name, email and phone.
6. Click **Submit**.
7. After submitting request, Verified Volunteer's team will provide assistance in setting up the account.
8. Once your account with Verified Volunteer's is setup, follow steps 1-3 above.
9. Click **Save**.

Request Background Check for Volunteers

You can directly request for a background check on volunteers who are already in your database.

☞ Before doing any background checks for volunteers, make sure that the volunteer's first name, last name, email, address and birthdate are complete.

1. From the **Dashboard**, click **Active Volunteers**. You can also click the **Main Menu,** then **Manage Volunteers** to go to your list of volunteers.
2. Next to the desired volunteer, click **Background Check** in the dropdown menu.
3. You can also request background check for all or selected multiple volunteers by clicking on **Selected Volunteers/Team/All Search Results** found at the bottom right of the page, then selecting **Background Check**.
4. A message will appear reminding you to complete all required information before proceeding.
5. Click **OK**.
6. If you miss any information, the status of the background check will fail so you'll have to update and repeat submission.

7. Look under the "Background Check" column. The following may appear:
    a. Pending: Request for background check is still to be processed. The system picks up requests every 5 minutes.
    b. Fail: Some volunteer information is missing.
    c. New: Request for background check has been submitted successfully. The volunteer will get a link to create an account on Verified Volunteers.
    d. InProgress: The volunteer has completed his/her account setup on Verified Volunteers.
8. It is now the responsibility of Verified Volunteers to do further background check and they will send the final status.

Request Background Check for Opportunity Applicants

You can also submit background checks for volunteers applying to an opportunity before they get approved/rejected.

👍 On step 2 (Requirements) when creating/editing an opportunity, make sure to activate "Background check required for Volunteer" to enable screening on application.
1. From the **Main Menu**, click **Our Opportunities**.
2. Click the count on number of "Volunteers Awaiting Approval" to open the list of pending volunteers.
3. Next to the desired volunteer, click **Background Check** in the dropdown menu.
4. Observe steps 4-8 above.

Create Reports

Organizations can create reports that pull information from their Fundly Connect™ accounts.

👍 You can find shortcuts for creating certain report types throughout the Fundly Connect™ site wherever you see an "Export" button. For example, to create a volunteer report, follow step 3 of the View all Volunteers of an Opportunity tutorial or step 4 of the Search for Volunteers tutorial.

Default Reports

Default reports are most convenient due to their predefined settings. They are available in categories such as opportunities, organizations, programs, trainings, and volunteers.

Set Filters

1. From the **Main Menu**, click **Default Reports**.
2. On the left of the screen, a list of report options appears. Click the desired report type.

3. A list of further refined report types will appear. Click the **information icon** for a description of the report.
4. Click **Execute** next to the desired report.
   Note: Each report has a default format; to execute the report in a different format, select the desired format from the dropdown menu.
5. For some reports, a "Report Filters" window will open. This allows you to apply filters to the data included in the report if you do not want to see all data available. If the report opens instead, proceed to step 11.
   Note: To learn what each icon or field does, hover over it (not all icons and fields offer this feature).
6. On the left is a list of filter fields. Use the dropdown menu to view different categories of filters. To apply one to your report, click on **the filter name** to highlight, then click **Add**.
7. On the right is the list of all filter fields to be included in your report. To rearrange the order of the fields, click the **up and down arrows**. To remove a field, click the **X icon**.
8. To set the operator for a filter, click on **the filter name** to highlight it. In the dropdown menu at the bottom of the window, select an operator. Fill in a value to complete the operator (i.e., enter a number, set date(s), select dropdown items). Different filters will use different operators and values, depending on the type of data stored in the respective field.
9. If desired, check the **Group With Next Filter** box and select either "AND..." or "OR..." from the dropdown menu.
10. To run the report, click **OK**.
11. Save your report to your computer. The process of saving reports differs based on the execution format chosen.

Schedule a Report

Fundly Connect™ gives users the ability to schedule reports to run at another time. This tool is helpful if you wish to automatically run reports on a set schedule, or if you wish to schedule reports that take a long time to process to run at a more convenient time.

1. Follow steps 1-3 from the Set Filters tutorial above.
2. Click **Schedule** in the dropdown menu of the desired report.
3. Enter a Schedule Name.
4. Select an Export Type. If available for the chosen export type, you can password protect your report by entering a Password. This feature is useful for reports that contain confidential information (e.g., social security numbers, financial information).
5. To run the report now, check the **Execute Immediately** box.
6. To set a schedule for the report, set the time when you wish to run the report next to "Schedule Time." To run the report multiple times on the same day, check the **Repeat Every...** box and set a frequency.
7. Set how often you wish to run the report under "Recurrence Pattern."
8. Set the date range during which you wish to run the report under "Range of Recurrence."

Note: To cancel a schedule, you must contact the support team at Fundly Connect™. For this reason, it is recommended that you set an end date or end point for all schedules.

9. Click **Next**.
10. Follow steps 6-9 from the Set Filters tutorial above to set filters. Click **Next**.
11. All scheduled reports will be received via email. On the "Recipients" page, enter the email address(es) where you wish to receive the report. Edit the subject and body of the email, if desired.
12. When done, click **Finish**.

Copy a Report

Fundly Connect™ gives users the ability to copy reports. This tool is helpful if you like a particular default report but wish to edit it to better fit your needs. All copied reports become custom reports.

1. Follow steps 1-3 from the Set Filters tutorial above.
2. Click **Copy** in the report's dropdown menu.
3. Enter a new name for the report and click **Copy**.
4. A new page will open showing the copied report. To access the report in the future, go to the **Main Menu** and click **Custom Reports**.

Custom Reports

Custom reports are an advanced tool not covered in this guide. However, when a default report is copied, it appears in your custom reports. Follow the steps below to access and edit a copied report.

1. From the **Main Menu**, click **Custom Reports**.
2. Use the Set Filters tutorial above for help editing or customizing the report.

The four types of custom reports are explained below.

1. **Express:** Simple reports for basic lists, etc. that do not require editing or formatting
2. **Standard:** Reports that have the ability to be edited and formatted with formulas (most default reports are standard reports)
3. **Cross Tab:** Reports that are used to compare information appearing in rows and columns
4. **Dashboard:** Reports that allow you to create a dashboard

Opportunity Search Widget

Opportunity search widgets allow you to display volunteer opportunities on external websites, helping your VAC and partner organizations promote your opportunities. With your Fundly

Connect™ account, you can create multiple widgets, each customized to display different opportunities. Fundly will then automatically generate the script needed to embed the widget into an external website.

1. From the **Main Menu**, click **Opportunity Search Widget**.
2. To create a new widget, click **Add New Widget** at the bottom right corner of the screen.
3. Enter a Widget Title.
4. To add a Widget Logo, click on **Click here OR Drop file here** and select the desired document from your computer.
5. Click on the **Build Criteria** tab.
   Note: Criteria selections made here will restrict the opportunities that appear in the widget. If you wish to display all opportunities in the widget, do not add any criteria.
   a. Select the Organization(s) and Program(s) whose opportunities you wish to appear in the widget.

   👍 Most partner organizations are unable to create opportunity search widgets in their accounts. To help a partner organization promote its opportunities, create a widget featuring only the organization's opportunities and provide them with the script to use on their website.

   👍 To promote a program, create a widget featuring the program's opportunities and display it on the program's or sponsors' websites.
   b. Under "What Would You Like To Do?," select the Cause(s), Skill(s), and Activity Type(s) you wish to include.
   c. Under "Appropriate For," select the Age range(s) you wish to include. To include opportunities that allow Team/Group Applications, check the box.
   d. Under "Who Would You Like To Serve?," select the Age range(s), Gender, and Population(s) Served you wish to include.
   e. When done, click **Save Build Criteria**. A preview of the widget will appear on the right side of the screen.
6. Click on the **Appearance** tab.
   a. Select the desired Font Color, Button Color, and Border Color.
   b. Enter a width and height for the widget.
   c. When done, click **Save Build Criteria**.
7. To generate the script for this widget, click **Generate Script**. You can then copy and paste the script into the HTML of your website.
8. If you wish to delete your work and reset all fields, click **Clear Build Criteria**.
   Note: Be sure to save your changes.
9. Click **Back** to return to the main opportunity search widget screen.
10. To edit a widget: Click **Edit** next to the desired widget.
11. To generate the script for a widget: Click **Generate Script** in its dropdown menu.
12. To delete a widget: Click **Delete** in its dropdown menu, then click **OK**.

Donation Widget

Donation widgets allow you to solicit donations on your VAC's public site. To create and display a donation widget, your VAC must also have a CRM subscription with Fundly Connect™.

♦ A Fundly CRM™ account includes many of the same features and perks of a Fundly Connect™ account, but with additional tools to manage pledges, grants, donors, members, and events, it will help your organization reach more donors, raise more funds, sell more memberships, and track more interactions and tasks.

1. From the **Main Menu**, click **Donation Widget**.
2. To create a new widget, click **Add New Widget** at the bottom right corner of the screen.
3. Enter a Title.
4. Select the desired Page(s) from your public site on which you wish to display the widget.
5. Enter the Script for the widget from your CRM account.
6. When done, click **Save**.
7. To edit a widget: Click **Edit n**ext to the desired widget.
8. To delete a widget: Click **Delete** in its dropdown menu, then click **OK**.

Log out of your Fundly Connect™ Account

1. From the Dashboard, click on the **account menu** at the top of the screen.
2. Click **Log Out**.