

Team Feature – Non-profit Organization (Meals On Wheels)

Tutorial

- Creating Teams
- Adding Team Members
- Assigning the Team to an Opportunity
- Scheduling the Team From Team Profile
- Scheduling Team Members
- Scheduling the Team from Open Routes
- Scheduling the Team/Member from Attendance Page
- Logging Hours for the Team/Member

Creating Teams

Team accounts can only be created on the organization’s public site. Team captains register their teams online and manage their accounts by logging into their Team Dashboard/Account.

Need help? Text XXX-XXX-XXXX

Volunteer/Team Login Organization Login

HOME ABOUT US CALENDAR PROGRAMS CORPORATE SERVICES HELP DONATE

ORGANIZATIONS VOLUNTEERS TEAMS

Team Signup Team List

Team Signup

Email

Email

Go

OR

Signup Using Social Media

f G+

Adding Team Members

As the organization, you can add Members to the Teams registered in your database. One place where you can add Members is on the Team’s profile. On the ‘Team Members’ section, click on the ‘Add Team Member’ button.

Team Captain Details: Misty Dawn | Email: acastle102+misty@gmail.com

Team Co-Captain Details: NA

Summary

0	Hours Logged
1	Opportunities Worked/Scheduled
0	Opportunities Waiting Approval
0	Unread Message

Trainings

Training	Date	Attended Dates
No records found.		

Opportunity Calendar Opportunity List

-- Select Opportunity to Assign -- Team Size Assign

Opportunity	Verified Hours	Unverified Hours	Next Step	Form
Meal Delivery	0	0	Log Hours	Form

Remove Volunteer

View All Opportunities

Team Members

Add Team Member

First Name	Last Name	Email	Mobile No.
No Record(s) Found			

It will open the 'Add Team Member' pop up where you must enter the member's name. If that member is already in your database, it will display the matching record on the dropdown. Otherwise, the system will require you to add the new member in the database first.

Add Team Member

Volunteer:

Brock

Brock Max

Add Member Close

Team Members

Add Team Member

First Name Last Name Email Mobile No.

No Record(s) Found

Members successfully added are listed on the 'Team Members' section of the Team Profile.

Team Members

Add Team Member

First Name	Last Name	Email	Mobile No.
Brock	Max		

Other places where members can be added to the team are on the Scheduling and Attendance screens, which will be shown later.

Assigning the Team to an Opportunity

Before you can assign a team to an opportunity, make sure that the team is registered in your database. On your Opportunity list, click the plus (+) sign of the opportunity to assign team. A pop up will come up where you'll have to enter the team name on the field. It will pull up the matching record which you can select. Lastly, click on 'Assign Volunteer'.

The screenshot shows a mobile application interface. A pop-up window titled "Assign Volunteer - Meal Delivery" is open. It has a search field labeled "Volunteer:" containing "Team Mis". Below the search field, a dropdown menu is open, showing "Team Misty" as the selected option. To the right of the dropdown are two buttons: "Assign Volunteer" (highlighted with a red box) and "Close". In the background, a table of opportunities is visible. The "Meal Delivery" row is highlighted with a red box, and a red arrow points to the plus sign (+) next to the number "13" in that row. The table has columns for Opportunity Name, dates, a count with a plus sign, Approval, Hours, and Unverified Hours. At the bottom of the screen, there are three buttons: "ADD BASIC OPPORTUNITY", "ADD ADVANCED OPPORTUNITY", and "ADD MEALS ON WHEELS OPPORTUNITY".

Another place where you can assign a team to an opportunity is on the Team Profile. Click on the 'Opportunity List' tab, and then click on the opportunity list dropdown to select the opportunity. Enter the Team Size then hit the 'Assign' button.

Team Misty

Team Type: General Team

PIN - B000004361

Team Captain Details: **Misty Dawn** | Email: acassie102+misty@gmail.com

Team Co-Captain Details: NA

Summary

4	Hours Logged
1	Opportunities Worked/Scheduled
0	Opportunities Waiting Approval
0	Unread Message

Trainings

Training	Date	Attended Dates
No records found.		

Opportunity Calendar

Opportunity List | -- Select Opportunity to Assign -- | Team Size | **Assign**

Opportunity	Verified Hours	Unverified Hours	Form

← BACK

Scheduling the Team from Team Profile

A team can be scheduled on the 'Manage Volunteers' page of the opportunity.

Manage Volunteers | Manage Volunteers | **Meal Delivery** | Edit Opportunity

Attendance

Notification

Spring Valley United Me... | Select Shift | All | From Date | To Date | Filter | Reset

8 Record(s) Found

Name	Next Step	Hours Volunteered	Unverified Hours
<input checked="" type="checkbox"/> Team Misty	Scheduling	0	0

Application Type : Team (5) | acassie102+misty@gmail.com | Remove Team

Scheduling can also be done on the Team's profile.

Team Misty
Team Type: General Team

Team Captain Details: Misty Dawn | Email: [redacted]

Team Co-Captain Details: NA

Summary

0	Hours Logged
1	Opportunities Worked/Scheduled
0	Opportunities Waiting Approval
0	Unread Message

Trainings

Training	Date	Attended Dates
No records found.		

Opportunity Calendar | **Opportunity List**

-- Select Opportunity to Assign -- | Team Size | Assign

Opportunity	Verified Hours	Unverified Hours	Next Step	Form	
Meal Delivery	0	0	Scheduling	Form	Remove Volunteer

Q View All Opportunities

Once you click on the 'Scheduling' link, it will open the Scheduling window. This is where you select the Venue, Route, Shift and Position for the team. At the bottom is where you can select the date/s that the team is volunteering. You can either manually choose available dates or schedule by 'Day of Week' (e.g. Every Monday). Hit Save.

Meal Delivery

Venue: Spring Valley United Methodist Church
Routes: 705A

Shift: Default Shift
Position: Driver

Starts from 02/20/2017 to 02/20/2019. Occurs on Every Mon ,Every Tue ,Every Wed ,Every Thu ,Every Fri from 10:00 AM to 12:00 PM

Availability: Date Day of Week

From Time: 10:00 AM
Till Time: 12:00 PM

Set Volunteering Dates

2/20/2017 2/20/2019 Search

<input type="checkbox"/> 2/20/2017	<input type="checkbox"/> 2/21/2017	<input checked="" type="checkbox"/> 2/22/2017	<input checked="" type="checkbox"/> 2/23/2017	<input checked="" type="checkbox"/> 2/24/2017	<input type="checkbox"/> 2/27/2017
<input type="checkbox"/> 2/28/2017	<input type="checkbox"/> 3/1/2017	<input type="checkbox"/> 3/2/2017	<input type="checkbox"/> 3/3/2017	<input type="checkbox"/> 3/6/2017	<input type="checkbox"/> 3/7/2017

Save Save & Add New Close

There will be times that the schedule date/s selected have already reached its required number of volunteers. This will now prompt a window showing the only available schedules/routes where the team can be scheduled. You can either continue to schedule for all available routes or just to selected routes.

MealsonWheels_2017

The Shift/Position has reached capacity on some of the selected dates. You can either schedule from the available dates below or select a different Opportunity.

Available Date(s)

Route : 701A

2017: October: 11, 18, 25 November: 1, 8, 15, 22, 29 December: 6, 13, 20, 27

2018: July: 4, 11, 18, 25 January: 3, 10, 17, 24, 31 March: 7, 14, 21, 28 April: 4, 11, 18, 25 May: 2, 9, 16, 23, 30 June: 6, 13, 20, 27 February: 7, 14, 21, 28 August: 1, 8, 15, 22, 29 September: 5, 12, 19, 26

October: 3, 10, 17, 24, 31 November: 7, 14, 21, 28 December: 5, 12, 19, 26

2019: January: 2

Route : 702A

2017: October: 11, 18, 25 November: 1, 8, 15, 22, 29 December: 6, 13, 20, 27

2018: July: 4, 11, 18, 25 January: 3, 10, 17, 24, 31 March: 7, 14, 21, 28 April: 4, 11, 18, 25 May: 2, 9, 16, 23, 30 June: 6, 13, 20, 27 February: 7, 14, 21, 28 August: 1, 8, 15, 22, 29 September: 5, 12, 19, 26

October: 3, 10, 17, 24, 31 November: 7, 14, 21, 28 December: 5, 12, 19, 26

Back Add to Selected Available Route(s) Add to Available Dates Close

Scheduling the Team Members

After scheduling the team, you can now schedule its members. In order to do that, you must select 'Edit/View Schedule' of the scheduled opportunity.

Opportunity	Verified Hours	Unverified Hours	Next Step	Form	Actions
Meal Delivery	0	0	Log Hours	Form	Edit/View Schedule Add Schedule Remove Volunteer

This will open the 'View Schedule' window with the team's schedule. Click on the dropdown then select 'Team Member Schedule'.

View Schedule

1 Record(s) Found

Venue	Shift	Position	Verified Hours	Unverified Hours	Actions
Spring Valley United Methodist Church (705A)	Default Shift	Driver	0	0	Edit Team Member Schedule View Delete

Occurs on selected dates [View Dates](#)

Add New

Again, it will open the Scheduling window for you to schedule the member. You'll only need to select the Volunteer's Name and the Route/s. As for the date/s, you can only schedule the member for date/s within the Team's schedule.

Meal Delivery ✕

Venue: Spring Valley United Methodist Church | Shift: Default Shift | Position: Driver

Starts from 02/20/2017 to 02/20/2019. Occurs on Every Mon ,Every Tue ,Every Wed ,Every Thu ,Every Fri from 10:00 AM to 12:00 PM

Volunteer Name: Brock Max | Routes: 705A

Availability: Date Day of Week

From Time: 10:00 AM | Till Time: 12:00 PM

Set Volunteering Dates

2/22/2017 2/24/2017 Search

2/22/2017 2/23/2017 2/24/2017

Save **Close**

After you have saved, the Team Member's schedule will be displayed below the Team schedule.

View Schedule ✕

1 Record(s) Found

Venue	Shift	Position	Verified Hours	Unverified Hours	
Spring Valley United Methodist Church (705A)	Default Shift	Driver	0	0	Edit ▾

Occurs on selected dates [View Dates](#)

Team Members

Name	Hours Volunteered	Unverified Hours	
Brock Max (705A)	0	0	Edit ▾

Occurs on selected dates [View Dates](#)

Add New **Close**

Team Members

Team Member(s) Schedule has been saved successfully.

Scheduling Team from Open Routes

It is also possible to schedule teams from the 'Open Routes' page. Just filter the list and enter the name of the team on the 'Assign To' field of the route/schedule. It will display a dropdown of the matching team record.

Open Routes

2/20/2017 2/20/2017 Meal Delivery Select Location Select Route(s) Get Open Route(s) Clear

-- Action -- Apply Total Open Locations: 1 | Total Open Routes: 2 View Summary

2 Record(s) Found

Route Number	Assign To	Substitute	Volunteer Pref.	Paid Driver	Staff
<input checked="" type="checkbox"/> 705A Date: 2/20/2017 Location: Spring Valley United Methodist Church	<input type="text" value="Team Mis"/> <input type="text" value="Team Misty"/>				Betsy Cox

Select that record and don't forget to hit Save. The route/schedule is then successfully assigned to the team.

Open Routes

2/20/2017 2/20/2017 Meal Delivery Select Location Select Route(s) Get Open Route(s) Clear

-- Action -- Apply Total Open Locations: 1 | Total Open Routes: 2 View Summary

2 Record(s) Found

Route Number	Assign To	Substitute	Volunteer Pref.	Paid Driver	Staff
<input checked="" type="checkbox"/> 705A Date: 2/20/2017 Location: Spring Valley United Methodist Church	<input type="text" value="Team Misty"/> Change				Betsy Cox
<input checked="" type="checkbox"/> 706A Date: 2/20/2017 Location: Spring Valley United Methodist Church	<input type="text" value="Choose Volunteer"/>				Betsy Cox

SAVE

Scheduling Team/Member from Attendance Page

Just like on the 'Open Routes' page, it is also possible to schedule the team on the Attendance page. You only have to enter the name on the Team field and select the record. The selected route/schedule will then be assigned to the team.

Attendance

2/21/2017 2/21/2017 Meal Delivery Select Location 705A Get Attendees Reset

Checked In Routes No Show Routes Open Routes

1 Record(s) Found

Schedule Date	Route Numbers	Team	Volunteer	Partner Driver
2/21/2017	705A (Location: Spring Valley United Methodist Church)	Team Mis Team Misty		

Logging Hours for the Team/Member

You are now ready to take the attendance of the team and its members in real time. On the Attendance page, click the Team Name to open the Attendance pop up.

Attendance

2/21/2017 2/21/2017 Meal Delivery Select Location 705A Get Attendees Reset

Checked In Routes No Show Routes Open Routes

1 Record(s) Found

Schedule Date	Route Numbers	Team	Volunteer	Partner Driver
2/21/2017	705A (Location: Spring Valley United Methodist Church)	Team Misty		

On the pop up, it will display the Date, Route Number and Team Name. If a member has been scheduled under this team schedule, it will also display that volunteer's name for check in. But since we just assigned this team on the Attendance screen, no member has been assigned to this schedule yet.

Attendance - 2/21/2017

Routes: 705A

Team Misty Change CHECK IN Add Member Schedule

Route Number	Name
705A	Choose Volunteer or Team

Close

You can enter the name of the member on the field to assign.

Attendance - 2/21/2017



Routes: [705A](#)

Team Misty

Change

CHECK IN



Add Member Schedule

Route Number

Name

705A

Brock

Brock Max

Close

On the other hand, you can also assign it to a non-member. It will pull up any matching volunteer record in your database or you can also create a new volunteer record on this screen. Once you select that volunteer, it will automatically add that volunteer to the team.

Attendance - 2/21/2017



Routes: [705A](#)

Team Misty

Change

CHECK IN



Add Member Schedule

Route Number

Name

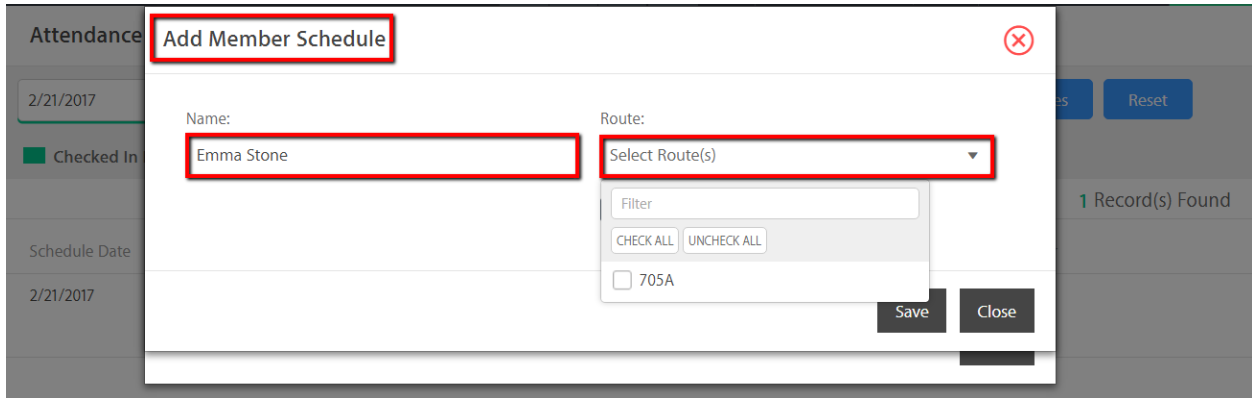
705A

Emma Stone

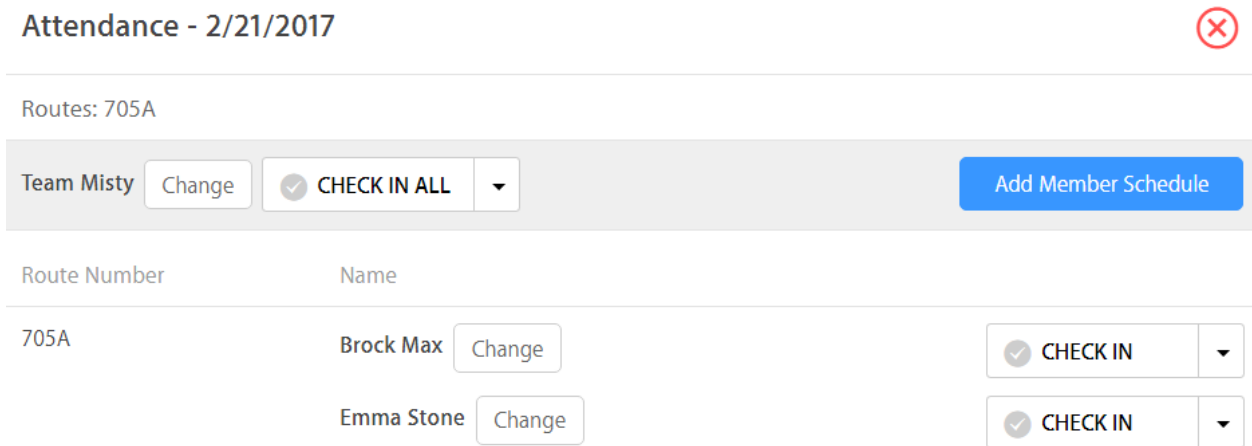
Emma Stone

Close

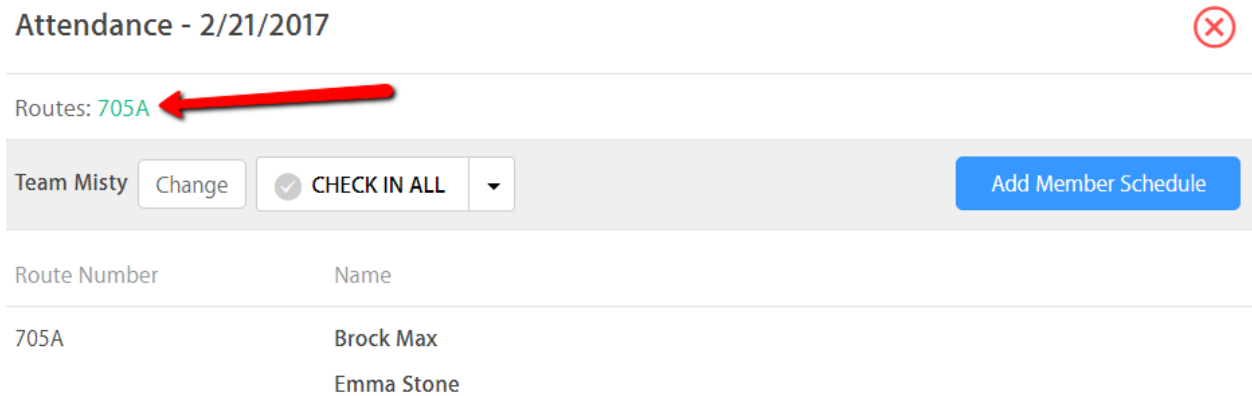
If more members showed up on that day, you will also be able to add those members by clicking on the 'Add Member Schedule' button on that pop up. Just enter the name of the volunteer (member/non-member) and select the route/s to assign.



After saving, it will now display the additional member on the Attendance Check in pop up.



To check in both of the volunteers, you just have to click on the 'Check in All' button. The route will then change colors from blue to green.



You will also see the color change on the Attendance page. If you have tagged them as 'No Show', then the routes will turn red (No Show), instead of green.

2/21/2017



705A

(Location: Spring Valley United Methodist Church)



Team Misty



The checked in hours are then reflected on the Team schedule,

View Schedule



3 Record(s) Found

Spring Valley United Methodist Church (705A)	Default Shift	Driver	4	0	Edit																								
Occurs on selected dates View Dates																													
Team Members																													
<table border="1"><thead><tr><th>Name</th><th>Hours Volunteered</th><th>Unverified Hours</th><th></th></tr></thead><tbody><tr><td>Brock Max (705A)</td><td>2</td><td>0</td><td>Edit</td></tr><tr><td colspan="6">Occurs on selected dates View Dates</td></tr><tr><td>Emma Stone (705A)</td><td>2</td><td>0</td><td>Edit</td></tr><tr><td colspan="6">Occurs on selected dates View Dates</td></tr></tbody></table>						Name	Hours Volunteered	Unverified Hours		Brock Max (705A)	2	0	Edit	Occurs on selected dates View Dates						Emma Stone (705A)	2	0	Edit	Occurs on selected dates View Dates					
Name	Hours Volunteered	Unverified Hours																											
Brock Max (705A)	2	0	Edit																										
Occurs on selected dates View Dates																													
Emma Stone (705A)	2	0	Edit																										
Occurs on selected dates View Dates																													

Team profile,

Team Misty

Team Type: General Team

PIN - B000004361

Team Captain Details: Misty Dawn Email:							
Team Co-Captain Details: NA							
Summary	Trainings						
4 Hours Logged	<table border="1"><thead><tr><th>Training</th><th>Date</th><th>Attended Dates</th></tr></thead><tbody><tr><td colspan="3">No records found.</td></tr></tbody></table>	Training	Date	Attended Dates	No records found.		
Training	Date	Attended Dates					
No records found.							
1 Opportunities Worked/Scheduled							
0 Opportunities Waiting Approval							
0 Unread Message							

as well as on the Member's profiles.



Brock Max

PIN: 8000004362 | None

SCHEDULE VACATION



Send Email: **No** | Joining Date: **2/20/2017**

Associated Team(s): **Team Misty**

Summary

2	Hours Logged
1	Opportunities Worked/Scheduled
0	Opportunities Waiting Approval
0	Hours Pending For Approval

Trainings

Training	Date	Attended Dates
No records found.		

Opportunity Calendar		Opportunity List		-- Select Opportunity to Assign --		Assign
+	Opportunity	Verified Hours	Unverified Hours	Next Step	Form	
+	Meal Delivery	2	0	Team Member	Form	Edit/View Schedule