

Team Feature – Team Captain

Tutorial

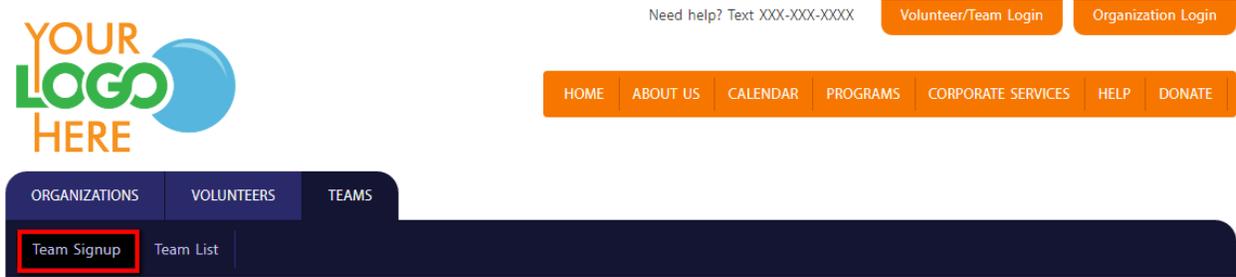
- Signing up as a Team
- Logging into the Team Dashboard/Account
- Adding Team Members
- Applying for an Opportunity as a Team
- Scheduling the Team
- Scheduling Team Members

Signing up a Team

Before you can apply for an opportunity, you must sign up/register your team on the organization website. Click on the tab labelled “Teams” to proceed to the signup page.

The screenshot displays the Fundly Connect website interface. At the top left, there is a placeholder for a logo that says "YOUR LOGO HERE" with a blue circle icon. To the right of this is a navigation bar with orange buttons for "HOME", "ABOUT US", "CALENDAR", "PROGRAMS", "CORPORATE SERVICES", "HELP", and "DONATE". Above the navigation bar, there is a link for "Need help? Text XXX-XXX-XXXX" and two orange buttons for "Volunteer/Team Login" and "Organization Login". Below the navigation bar is a dark blue menu with tabs for "ORGANIZATIONS", "VOLUNTEERS", and "TEAMS". A red arrow points to the "TEAMS" tab. Below the menu are two sub-tabs: "Become a Partner" and "Resources". The main content area features the Fundly Connect logo, which consists of a blue heart icon with a white outline and the text "FUNDLY" in large blue letters and "CONNECT" in orange letters. To the right of the logo is a search bar titled "Search Volunteer Opportunities" with two input fields: "Keyword" and "Enter your address". Below the input fields are two buttons: "SEARCH" (orange) and "ADVANCED SEARCH" (blue). At the bottom of the page, there is a dark blue footer with three statistics: "Active Opportunities : 15", "Number of Volunteers : 45", and "Hours Volunteered : 124".

The page will automatically open the 'Team Signup' page where you'll have to enter your email address or link this to your social media accounts (e.g. Facebook/Google+).



Team Signup

The screenshot shows the "Team Signup" form with two main options:

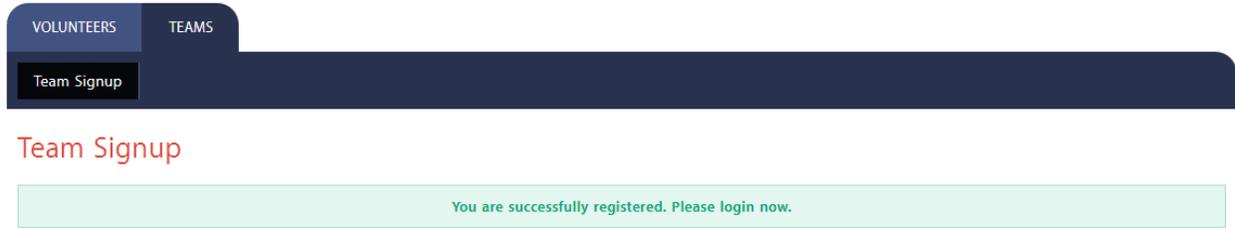
- Email:** A text input field labeled "Email" with a "Go" button below it.
- OR**
- Signup Using Social Media:** Two social media icons (Facebook 'f' and Google+ 'G+') are shown in a box, both highlighted with a red box.

The next steps will be to enter your team information as well as information needed/required by the organization. You will have to enter the Team Captain's information, which will be the main contact person of the team.

The screenshot shows the "Team Signup" form with a progress bar and detailed input fields:

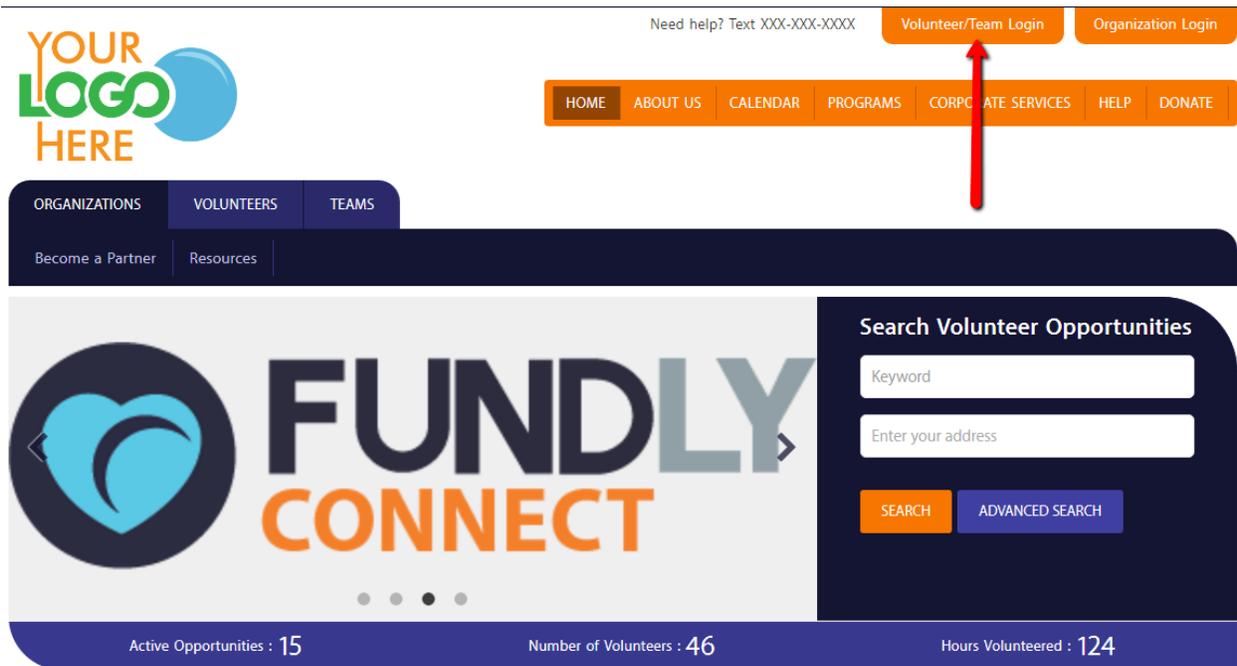
- Progress Bar:** Shows three steps: 1. Basic Info, 2. Causes, 3. Agreements. Step 1 is currently active.
- Basic Info:**
 - Username
 - Password (Min. Length 6)
 - Confirm Password
- Team Details:**
 - Team Name
 - Approximate Team Size
 - Radio buttons: General Team (selected), Organizational Team, Family Team
- Team Captain:**
 - First Name
 - Last Name
- Team Captain Contact Info:**
 - Mobile No.
- Address Details:**
 - Address Line1
 - Address Line2
 - USA (Country dropdown)
 - Zip
 - City
 - County
 - Select State --- (State dropdown)
- Next:** A "NEXT" button is located at the bottom right of the form.

After completing the steps, it will display a confirmation message.



Logging into the Team Dashboard/Account

To login to your Team Dashboard/Account, just click on the 'Volunteer/Team Login' button on the upper right corner of the website page.



It will open a pop up where you can either log in or sign up. Since we have already completed your signup, you can now login using the Username and Password you have entered on signup or click on the social media link.

LOGIN ✕

Username

Password

Login [Forgot Username/Password?](#)

OR

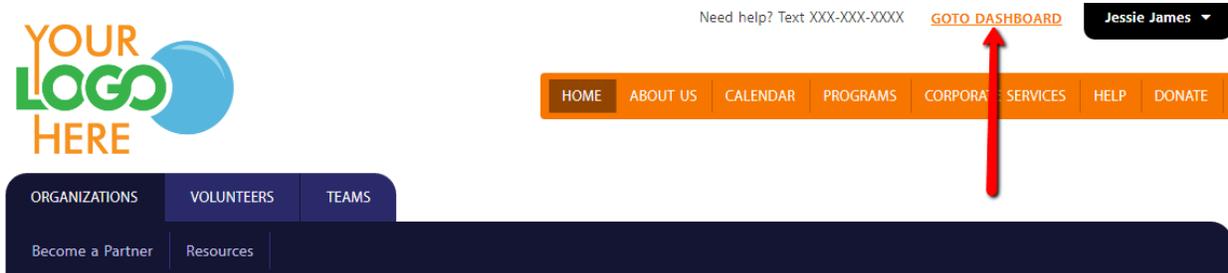
LOGIN USING SOCIAL MEDIA

Don't have an Account?

SIGNUP

After the page loads, you will notice that your account name will be displayed at the top right corner of the screen. You will also see a 'Go To Dashboard' link which will take you to your Account portal. Click on that link.



Need help? Text XXX-XXX-XXXX [GOTO_DASHBOARD](#) **Jessie James** ▾

YOUR LOGO HERE

HOME ABOUT US CALENDAR PROGRAMS CORPORATE SERVICES HELP DONATE

ORGANIZATIONS VOLUNTEERS TEAMS

Become a Partner Resources

A red arrow points to the [GOTO_DASHBOARD](#) link in the top right corner of the page.

The page will redirect you to the Team Captain's Volunteering Dashboard where it displays the Team Captain's volunteering information.

My Volunteering Dashboard

PIN - B000004357 SCHEDULE VACATION

0 HOURS LOGGED

0 OPPORTUNITIES WORKED/SCHEDULED

0 OPPORTUNITIES PENDING APPROVAL

My Opportunities

Opportunity	Next Step	Total Hours	Pending Hours	Send Email to Coordinator
No Record(s) Found				

In order to switch to the Team's Dashboard, you must click on the main menu (which is found at the top right corner of the page), then select 'Team Dashboard'.

My Volunteering Dashboard

PIN - B00

0 HOURS LOGGED

0 OPPORTUNITIES WORKED/SCHEDULED

0 OPPORTUNITIES PENDING APPROVAL

My Opportunities

Opportunity	Next Step	Total Hours	Pending Hours	Send Email to Coordinator
No Record(s) Found				

- Dashboard
- Team Dashboard
- Manage Documents
- Search Preferences
- My Profile
- My Volunteer Calendar
- Credentials

This opens your Team Dashboard where you can manage your team information and data.

My Team Dashboard

Team Rocket

Edit Team

Manage Documents

View Team Calendar

Summary

- 0 Hours Logged
- 0 Opportunities Worked/Scheduled
- 0 Members
- 0 Team Member(S) Pending Approval

Team Type

General

Team Captain Details

Jessie James

Team Co-Captain Details

NA

Allow Volunteer to Join Online

Manage Opportunities

Manage Members

Opportunity	Total Hours	Pending Hours	Next Step	Send Email to Coordinator
No Record(s) Found				

Adding Team Members

The Team Dashboard is also where you can add your team members. The 'Manage Members' tab is where you enter the member's information (First and Last Name, Email and Mobile No.) to add them.

The screenshot shows the 'My Team Dashboard' for 'Team Rocket'. The 'Manage Members' tab is active. The form fields for adding a member are highlighted with a red box, and the 'Add' button is also highlighted. A red arrow points from the 'Manage Members' tab to the form fields, and another red arrow points from the 'Add' button to the text below.

First Name	Last Name	Email	Mobile No.
Required	Required	Required	Mobile No.

[Add](#)

No Record(s) Found

The 'Manage Members' tab will display members successfully added to the team.

The screenshot shows the 'Manage Members' tab with a member successfully added. A green notification box says 'Team Member added successfully.' The member's information is displayed in the table below.

First Name	Last Name	Email	Mobile No.
Required	Required	Required	Mobile No.
Ash	Ketchum		(111) 111-1111 ext.1111

[Add](#)

Team Member added successfully.

You can also create an account for the member wherein he/she can login to his/her own volunteer portal and manage his/her opportunities. Beside the member's record, just click on the 'Create User' button to send the member's login information to his/her email address.

The screenshot shows the 'Manage Members' tab with a member successfully added. A red arrow points to the 'Create User' button next to the member's record.

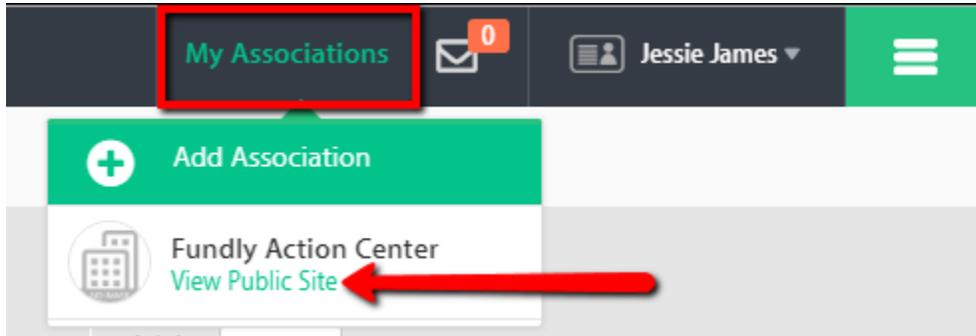
First Name	Last Name	Email	Mobile No.
Required	Required	Required	Mobile No.
Ash	Ketchum		(111) 111-1111 ext.1111

[Add](#)

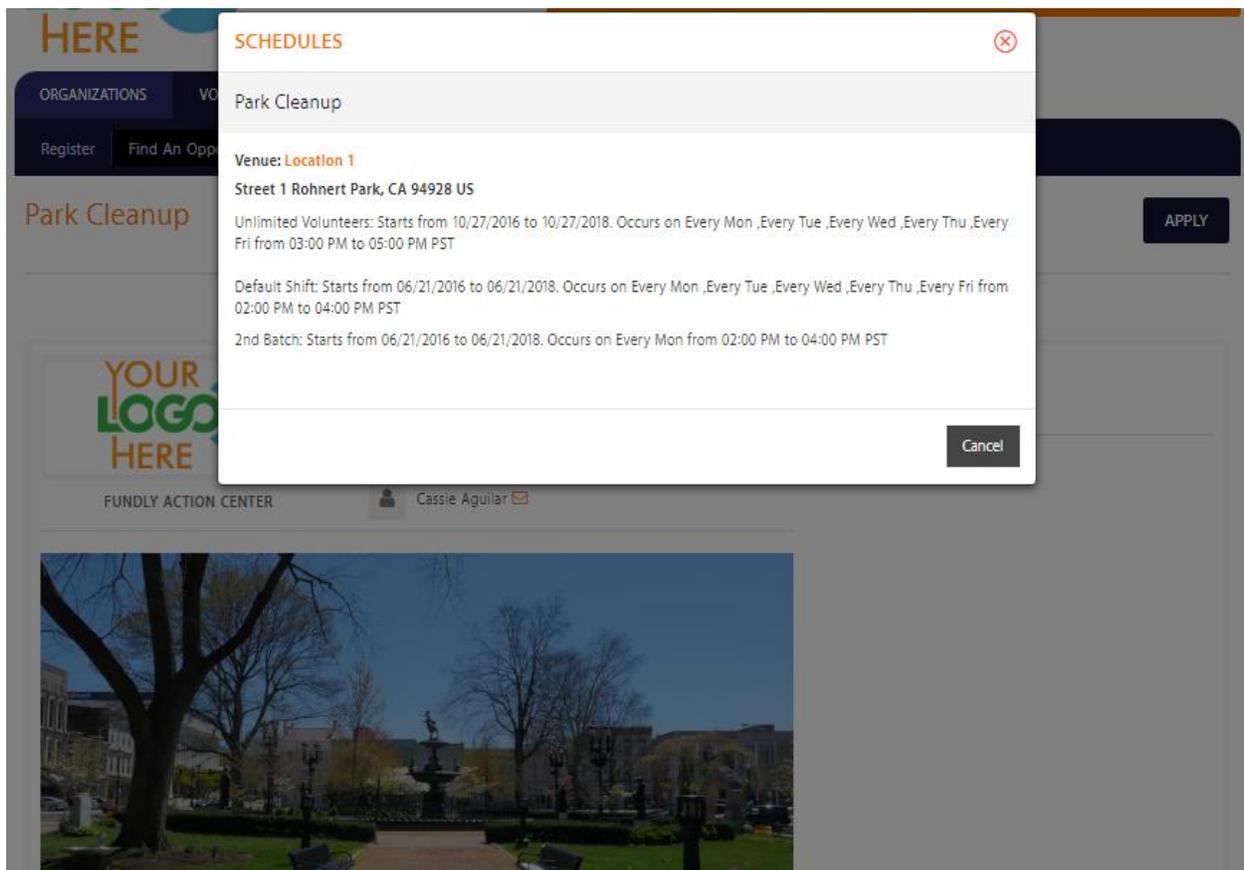
[Create User](#) [Edit](#)

Applying for an Opportunity as a Team

You can start searching for an opportunity by going back to the non-profit organization's website. At the upper right portion of the dashboard, you will see the 'My Associations' button. It will list all the organizations that you are associated to and it'll have the 'View Public Site' link which will direct you to their website.



When searching for opportunities on the site, you'll be able to open the opportunity's page, where details on the opportunity are listed, including the schedules available.



If you decide to apply for the opportunity, just hit either of the two 'Apply' buttons found at the top and at the bottom of the opportunity page.



Park Cleanup

APPLY

1 View

2 Submit Application



FUNDLY ACTION CENTER

Tuesday, June 21, 2016 - Saturday, October 27, 2018

View Schedules

Cassie Aguilar

Causes Demo Area



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Scheduling the Team

After applying for the opportunity, you are now ready to schedule your team for the opportunity. If the opportunity does not require volunteer application review, then you can immediately proceed to Scheduling from submitting application. 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.

Meal Delivery
✕

Venue:

Shift:

Routes:

Position:

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:

Till Time:

Set Volunteering Dates

2/20/2017
 2/20/2019

<input checked="" type="checkbox"/> 2/20/2017	<input checked="" type="checkbox"/> 2/21/2017	<input type="checkbox"/> 2/22/2017	<input type="checkbox"/> 2/23/2017	<input 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
<input type="checkbox"/> 2/8/2017	<input type="checkbox"/> 2/9/2017	<input type="checkbox"/> 2/10/2017	<input type="checkbox"/> 2/13/2017	<input type="checkbox"/> 2/14/2017	<input type="checkbox"/> 2/15/2017

Save
Save & Add New
Close

You can either manually choose available dates or schedule by 'Day of Week' (e.g. Every Monday). Lastly, hit Save.

Availability: Date Day of Week Monthly

From Date:

Till Date:

From Time:

Till Time:

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Every	<input type="checkbox"/>						
First	<input type="checkbox"/>						
Second	<input type="checkbox"/>						

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

If volunteer application approval is required for the opportunity, you'll have to wait for the approval before you can schedule. Once you are approved, you can schedule by going into your Team Dashboard and clicking on the 'Scheduling' link under the 'Manage Opportunities' tab. Once you click on the 'Scheduling' link, it will open the Scheduling window.

My Team Dashboard Team Rocket Edit Team Manage Documents View Team Calendar

My Associations 0 Jessie James

Summary

0	Hours Logged
2	Opportunities Worked/Scheduled
1	Members
0	Team Member(S) Pending Approval

Team Type: General

Team Captain Details: Jessie James

Team Co-Captain Details: NA

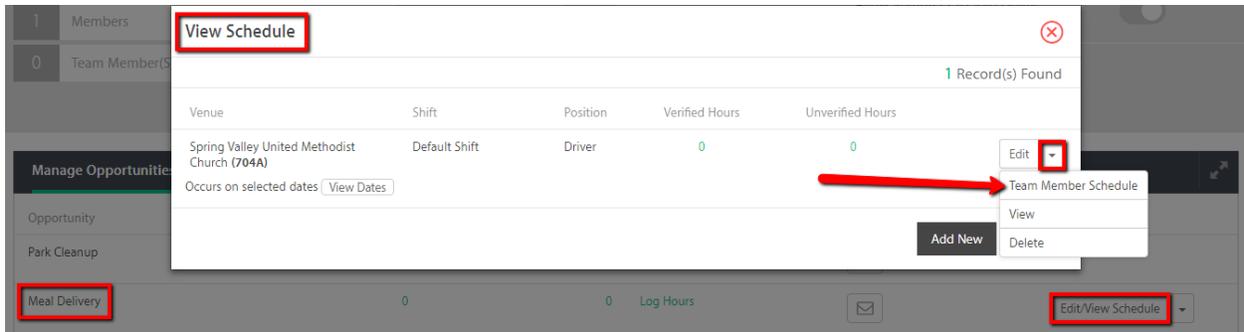
Allow Volunteer to Join Online:

Manage Opportunities Manage Members

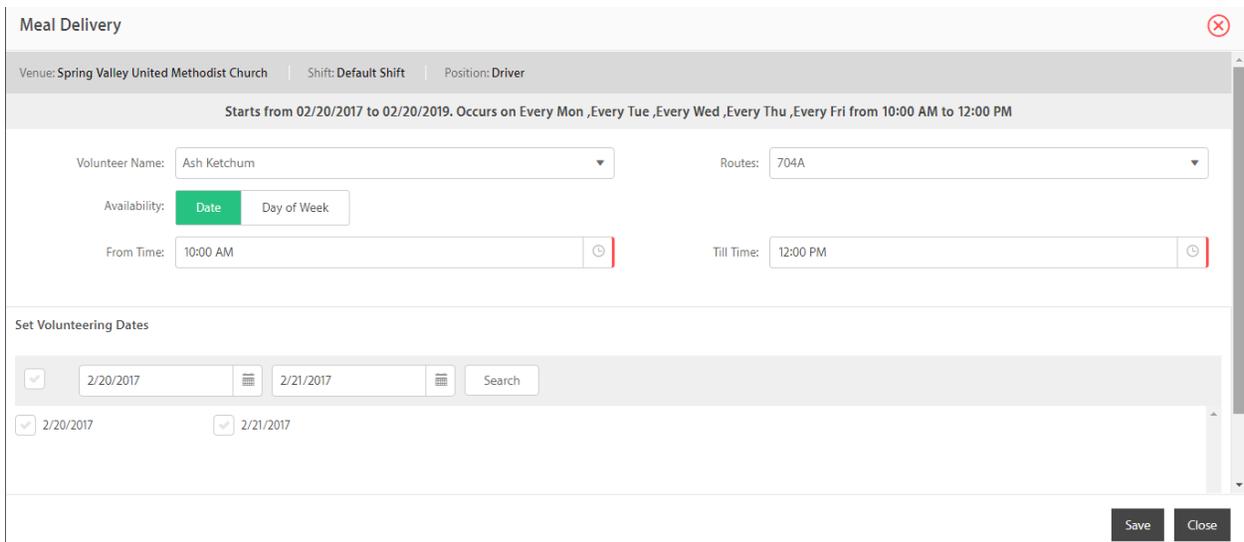
Opportunity	Total Hours	Pending Hours	Next Step	Send Email to Coordinator
Meal Delivery	0	0	Scheduling	<input type="checkbox"/>

Scheduling the Team Members

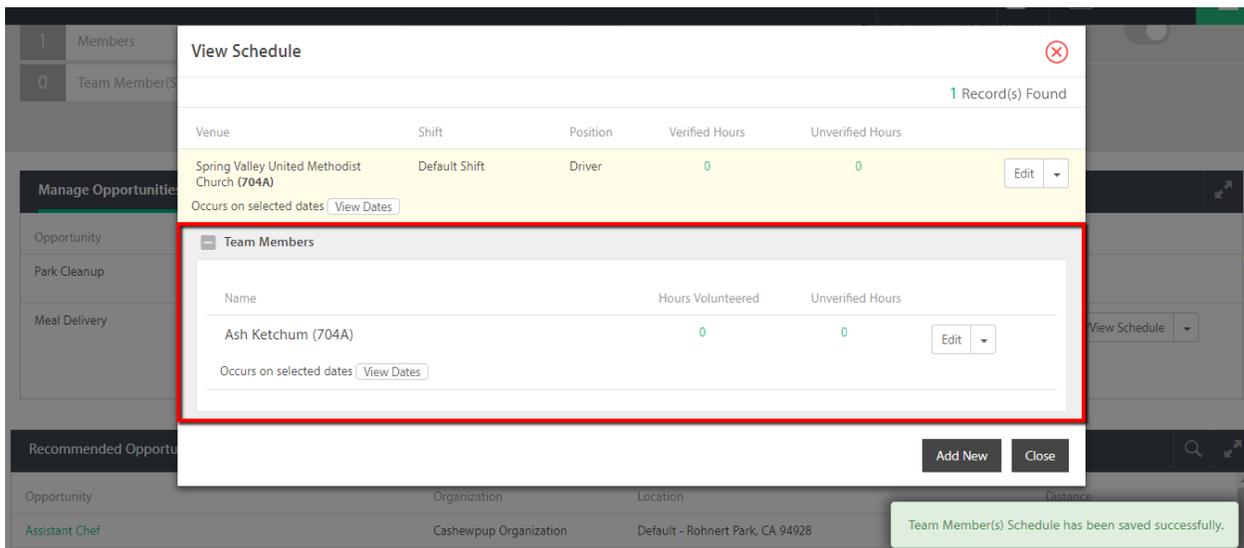
After scheduling the team, you can now schedule its members. In order to do that, you must select 'Edit/View Schedule' of the scheduled opportunity. This will open the 'View Schedule' window with the team's schedule. Click on the dropdown then select 'Team Member Schedule'.



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.



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



What's left to do now is for the team/members to show up on the scheduled dates at the venues and perform the tasks required. After completing the tasks, the organization shall credit the hours for each member who attended and these hours will reflect on each member's record, as well as on the team profile.

The screenshot displays a 'View Schedule' window for a team named 'Team Rocke'. The window shows a table with one record found. The record details are as follows:

Venue	Shift	Position	Verified Hours	Unverified Hours
Spring Valley United Methodist Church (704A)	Default Shift	Driver	2	0

Below the table, there is a section for 'Team Members' which contains a table with one member record:

Name	Hours Volunteered	Unverified Hours
Ash Ketchum (704A)	2	0

The interface includes a sidebar on the left with a 'Summary' section showing '2 Hours Logged' and a 'Team Members' section with '1 Opportunity' and '0 Unread'. At the bottom, there are buttons for 'Add New', 'Close', 'Log Hours', and 'Form'. A 'BACK' button is visible in the bottom left corner.