

Fundly Connect Playbook for Partner Organizations

Setting up for Success.

Welcome to Fundly Connect – **YOUR VOLUNTER CENTER NAME'S** latest platform for volunteer management. This is an innovative technology that allows your organization to post volunteer opportunities to our public site and better manage your volunteers. As a current partner organization, you will be required to sign in using your _____ login and temporary password that was sent to your email. Upon login you will have access to a free nonprofit account and can access key tools allowing you to:

- 1 – Access your database and post your volunteer opportunities to our site
- 2 – Manage volunteer schedules, log hours, send robust communications
- 3 – Configure settings and report on volunteer activity

This guide is best used with two screens or printed offline so that you can follow along in the tool on one screen and have this up to navigate

Testing.

If you are a paying Volunteer Center Fundly Connect customer and want to test out Agency account functionality on the Fundly Connect demo site, please signup for an nonprofit organization account at <http://fundlyconnectdemo.com/site/acs>

- *Make sure to “become a partner”
- *You will be sent credentials upon signup
- *If you’d like to create a volunteer account you can do that as well



HandsOn
NETWORK

The Intersection of Young Professionals and Volunteer Opportunities

Volunteer/Team Login

Organization Login

HOME

ABOUT US

CALENDAR

PROGRAMS

CORPORATE SERVICES

HELP

DONATE

Dear Partner Org Name,

HandsOn XXXXXXXX has upgraded their volunteer management software to **Fundly Connect**, chosen by some of the largest volunteer organizations in the world and Points of Light Global Alliance Partner. This change will be effective as of **Feb, 2016**. As a result, your **password has been changed**. You will receive an email from Fundly with a temporary password. To access your account, please follow the steps below.

Go to: <http://handsonyourcity.org>

Click on Organization Login-

Username: Current Username

Password: Temp Password

Once you have logged in, you can change your password by:

1. Click on your username on the top right hand corner, then click on Account (you may be prompted to login again due to security reasons). Once the Account screen is up, select Credentials-

Connect Playbook



Differentiators

1



DIFFERENTIATORS

Fresh User Interface and navigation. Basic Opportunity and Advanced Opportunity Posting options to your Volunteer Center Portal. A 1-2-3 simple process

Provide your volunteers with a modern dashboard that explains next steps, recommends opportunities, and empowers team and corporate team volunteering

Volunteer Center can provide you with a "Search Widget" to put on your web site which shows your logo and all volunteer opportunities

A full communications module with beautiful templates you can edit to send to your volunteers AND metrics showing opens, clicks, bounces and more

Quick Add volunteers to your database and flip between calendar or list view to log hours and manage attendance

Integrate Fundly Connect with Fundly CRM and reap the benefits of Fundly's Crowdfunding Platform



19 ACTIVE VOLUNTEERS **1 ACTIVE TEAMS** **8 ACTIVE OPPORTUNITIES**

Summary of Scheduled Volunteer(s)

From [] To [] [Filter](#)

4 New Volunteers	4 Individual Volunteers	0 New Teams	0 Team Volunteers
4 Total Volunteers	109.16 Hours Volunteered By Individuals	0 Hours Volunteered By Teams	109.16 Total Hours Volunteered

ORGANIZATIONS VOLUNTEERS TEAMS

Organization Sign Up Resources for Organizations

Search Volunteer Opportunities

Keyword

Enter your address

[SEARCH](#) [ADVANCED SEARCH](#)

Number of Opportunities : 0 Number of Volunteers : 0 Hours Volunteered : 0

My Team Dashboard

YOPros [Edit Team](#) [Manage Documents](#)

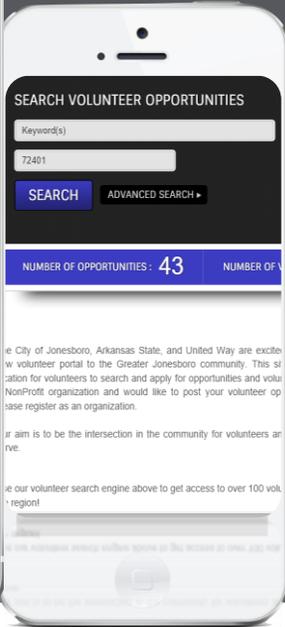
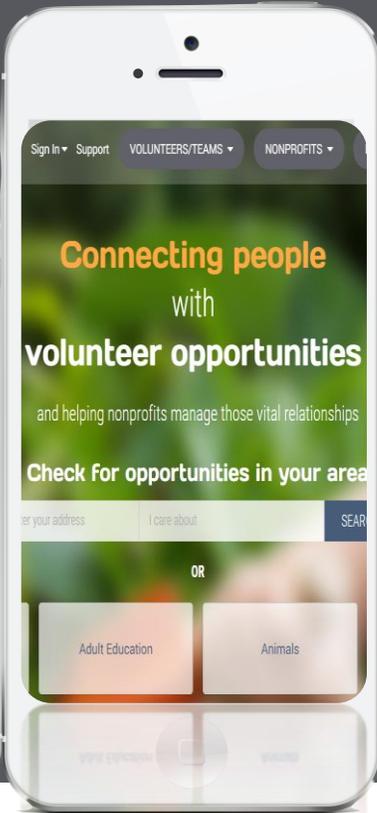
Summary	Team Captain Details	Team Co-Captain Details
0 Hours Logged	Dan Wain Change	NA Change
1 Opportunities Worked	✉ dan.wain1@gmail.com	
3 Members	📞 8434120049	

[Manage Opportunities](#) [Manage Members](#)

1

Responsive Design

Meet the demands of your volunteers and corporate relationships



Design

All products in the Fundly suite are mobile responsive meaning your donors and volunteers can access the info they need from the device of their choice



Agnostic

The platform can be accessed via any internet browser. Each product is cloud based so team members can retrieve and enter data from home, in the office, or on the road



Access

With over half of a nonprofits volunteers and donors likely visiting the organization through a mobile device, you can't afford to have a misaligned user experience

A Growing Trend

50%

50% of ecommerce traffic occurs through a mobile device (40% smart phone, 10% tablet)

Having a mobile-ready toolbox is crucial for managing relationships and administering fundraising campaigns, volunteer programs, and running a nonprofit optimally. As fundraising professionals and volunteer leaders are often out of office and more and more relationships are developed on the fly, being able to provide a mobile experience facilitates better engagement, easier volunteer management capabilities, and a sound data management strategy.

Configurations and General

2

Logging In

1. Start by clicking **Organization Login**

2. Sign in using your current username and temp. password

SIGN IN BELOW TO GET STARTED

freeagency

.....

LOGIN

Remember Me [Forgot Username/Password?](#)

Works best with the following setup:
Browsers - Browsers - Mozilla Firefox 42.0, Chrome 47.0.2526.73 m, Safari 9.0.1(11601.2.7.2) and IE 11
Resolution - 1024 * 768 and above Internet Connection Speed - 2Mbps

Atlanta Charitable Society The Intersection of Young Professionals and Volunteer Opportunities Volunteer/Team Login Organization Login

HOME ABOUT US CALENDAR PROGRAMS CORPORATE SERVICES HELP DONATE

ORGANIZATIONS VOLUNTEERS TEAMS

Become a Partner Resources **Calendar of Opportunities**



Search Volunteer Opportunities

Keyword

Enter your address

SEARCH **ADVANCED SEARCH**

Active Opportunities : 1 Number of Volunteers : 2 Hours Volunteered : 8

2

Dashboard Overview

- Dashboard
- Configurations
- Orientations & Trainings
- Opportunities
 - Design Application Form
 - Our Opportunities
- Reports
 - Default Reports
 - Custom Reports
- Manage Volunteers
 - Add Volunteer
 - Search Volunteer
 - Volunteer Coordinators
- Comm
 - My Templates
 - Communication History
 - Create New

By clicking on one of the color coded blocks, you are taken to a list representing your selection

Try adding a few volunteers to your account manually

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ACTIVE VOLUNTEERS

1

ACTIVE TEAMS

4

ACTIVE OPPORTUNITIES

Summary of Scheduled Volunteer(s)

From To Filter

4 New Volunteers	4 Individual Volunteers	0 New Teams	0 Team Volunteers
4 Total Volunteers	100.31 Hours Volunteered By Individuals	0 Hours Volunteered By Teams	100.31 Total Hours Volunteered

Your dashboard metrics update when:

- New opportunities are activated by you
- Volunteers or teams apply to your opportunities
- Hours are logged for a volunteer

2

Volunteer Profile

Navigation: Search, Add, Profile, Refresh

My Associations | Daniel Wainiel | [Menu]

Dan Wain
PIN: A000000259 | None

Send Email: **Yes** | Send Text: **No**

- ADD VOLUNTEER
- ADD OPPORTUNITY - BASIC
- ADD OPPORTUNITY - ADVANCED
- ADD HOURS

8434120049 | dan.wain1@gmail.com | 2/14/1979
123 main st, GA, US

Summary

- 80 Hours Logged
- 10 Opportunities Worked
- 4 Opportunities Waiting Approval
- 0 Unread Message

Trainings

Training	Date	Attended Dates
Working with Youth	2/20/2016 - 2/20/2017	View Dates

Opportunities | -- Select Opportunity to Assign -- | [Assign](#)

Opportunity	Verified Hours	Unverified Hours	Next Step	Form	
Help us get started	0	12.62	Log Hours		Remove Volunteer
Festival Garbage Clean Up	0	0	Log Hours	Form	Remove Volunteer
Grading SCORE Tests	0	0	Scheduling	Form	Remove Volunteer

[EDIT VOLUNTEER](#)

- From the volunteer profile you can also do a number of tasks such as assign them to an opportunity, edit schedules, view training dates, log hours, and review skills and causes they are passionate about
- General demographic information and custom data sets also live here
- If you need to change any information on the volunteer, select **Edit Volunteer**
- A volunteer will fill out much of the demographic and interests information upon signup online, but you can also add volunteers offline and send them an account setup link so they can login to Fundly Connect (recommended)

My Account

Navigation bar with search, add, user, and refresh icons. Text: My Associations, Daniel Wainiel, and a menu icon.

Account

Credentials

Fundly CRM

Fundly Connect

Organization Info
 My Account
Credentials
 Users
 Application Roles

Change Username

User Name:

[Save](#)

Change Password

Old Password:

Password:

Confirm Password:

[Save](#)

Fundly Connect

Will always take you back into your dashboard

2

1. Click My Account
2. Click Credentials and change PW
3. Click Organization Info fill out your organizations information (upload your logo)
4. Click Application Roles (more on next page)
5. Click Users to create new ones (email sent)

2

Application/User Roles

- Account
- Organization Info
- My Account
- Credentials
- Users
- Application Roles

Application Roles Fundly CRM Fundly Connect

Role: Description:

Accounts Fundly Connect

Opportunity Management

Process the published opportunity	<input type="radio"/> Allow	<input type="radio"/> Deny
Manage Opportunities (Add/Edit)	<input type="radio"/> Allow	<input type="radio"/> Deny

Configuration

Configure Custom dataset	<input type="radio"/> Allow	<input type="radio"/> Deny
Delete Custom Dataset	<input type="radio"/> Allow	<input type="radio"/> Deny

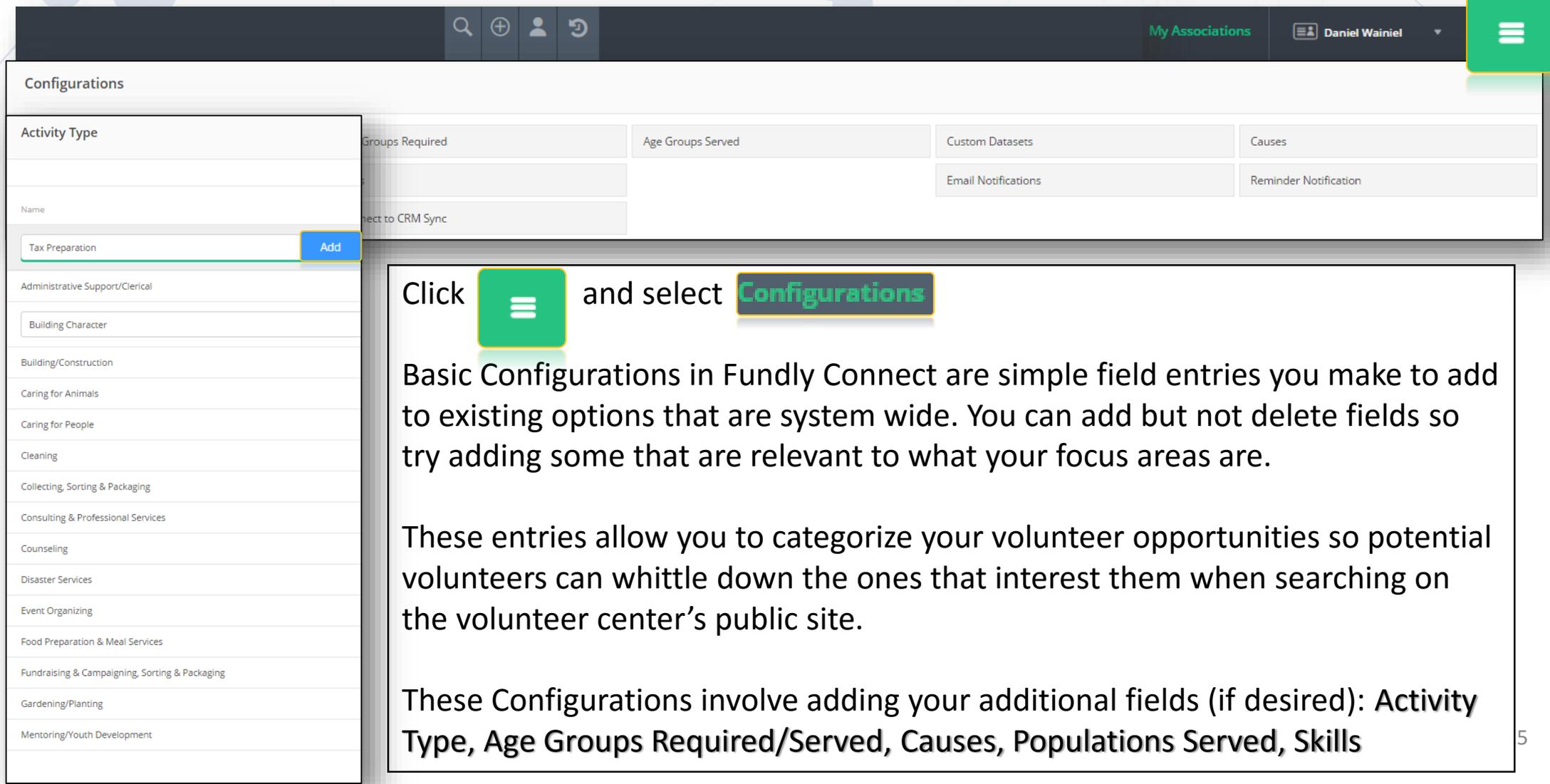
← BACK SAVE

*Roles allow you to Allow/Deny specific volunteer management functions for users in Fundly Connect

*When you create a new user, you need to assign them a role. In this example I am creating a limited role for a volunteer

*Click Fundly Connect for your dash

Basic Configurations – Activity Types, Age Groups, Causes, Populations, Skills



Configurations

Activity Type

Groups Required

Age Groups Served

Custom Datasets

Causes

Email Notifications

Reminder Notification

Name

Connect to CRM Sync

Tax Preparation **Add**

Administrative Support/Clerical

Building Character

Building/Construction

Caring for Animals

Caring for People

Cleaning

Collecting, Sorting & Packaging

Consulting & Professional Services

Counseling

Disaster Services

Event Organizing

Food Preparation & Meal Services

Fundraising & Campaigning, Sorting & Packaging

Gardening/Planting

Mentoring/Youth Development

Click  and select **Configurations**

Basic Configurations in Fundly Connect are simple field entries you make to add to existing options that are system wide. You can add but not delete fields so try adding some that are relevant to what your focus areas are.

These entries allow you to categorize your volunteer opportunities so potential volunteers can whittle down the ones that interest them when searching on the volunteer center's public site.

These Configurations involve adding your additional fields (if desired): **Activity Type, Age Groups Required/Served, Causes, Populations Served, Skills**

Configurations – Custom Data Sets [Opportunity Level]

Custom Datasets

Dataset

Data Set Name: Description:

Applicable To: Volunteer Opportunity

Fields

Name Type

No Record(s) Found

Field Type Options

- Text
- Text
- Multiline Text
- Number
- Yes or No
- Phone
- Email
- Url
- Date
- Date & Time
- Dropdown (single choice)
- Radio button (single choice)
- Checkbox (multiple choice)
- Picture
- Document

Add New Field

Field Name:

Field Type:

Required Staff Use Only

Options:

-
-
-
-
-
-

- A custom data set at the Opportunity level allows you to create questions on your Opportunity Signup Forms
- In the example, we have created a Dataset called and a field type of
- Determine whether or not you want this to be a required or optional question on your signup form Required
- You can add more than one question/field and field type to a data set
- Create your dropdown options to the question and

2

Configurations – Custom Data Sets [Opportunity Level Example]

Navigation bar with search, add, user, and refresh icons. Text: My Associations Daniel Wainiel. A green menu button is on the right.

Submit Application - Festival Concessions Volunteer

Progress bar: 1 View, 2 Additional Info., 3 Submit Application

Name

First Name: Last Name:

Email

Mobile Phone

Custom data set: "How often do you volunteer with charities?"

Buttons: BACK, SAVE AND NEXT

- This is an example of an online application form a volunteer might fill out on the Volunteer Center site to apply to your opportunity
- Your dataset appears on the form with dropdown options you've input
- See Page 19 for more info on Application Forms

Configurations – Custom Data Sets [Volunteer Level]

Custom Datasets - VIP Volunteer Data

Dataset

Data Set Name: Description:

Applicable To: Volunteer Opportunity

Fields

Name	Type
No Record(s) Found	

Add New Field

Field Name:

Field Type:

Required Staff Use Only

- A custom data set at the Volunteer level allows you to track questions and data fields on volunteers in the “back office” in volunteer records
- In this example we have created a Dataset called and a field type of
- If you select Staff Use Only the dataset will only be available for your staff to fill out on volunteer records when editing volunteers in Fundly Connect
- Go ahead and create a few fields for this data set. Make sure to save your fields

2

Configurations – Custom Data Sets [Volunteer Level Example]

Manage Profile PIN - B000000008

 **Dani Wynne** Social Media Preference
Joining Date - 2015/12/10 04:39:09 View Volunteer

My Profile. Programs **Additional Info** Emergency Contact Social Media Documents

Volunteer dataset

Emergency Responder?:
 Yes No

- An example showing your Volunteer Custom Dataset while editing a volunteer record in “Additional Info”

Advanced Configurations – Email Notifications

My Associations Daniel Wainiel

Email Notifications

15 Record(s) Found

Title	Subject	Sender Name	Status
Changed password Code : CNGPS	Password Reset		✓
Forgot Username Code : FORGOTUN			
Opportunity Approved Code : OPPAPPBYAN			
Opportunity Approved For Program Code : OPPPROGAPPBYAN			
Opportunity Rejected Code : OPPREJBYAN			
Opportunity Rejected For Program Code : OPPPROGREJBYAN			
Opportunity Reminder Notification Code : OPPREMINDERMAIL			
Organization Association Code : ORGVACASSOCIATION			
Organization Signup Code : ORGSIGNUP			

Email Notifications - Volunteer Signup Notification

Sender Email: support@fundlyconnect.com Sender Name: Fundly Connect

Subject: Volunteer Signup Notification Active Additional Info

Receiver Email: _____ CCAddress: _____

Contents:

Dear {OrganizationName},

A new volunteer is registered.

Volunteer Information

Name	{DisplayName}
Email:	{Email}

- Email Notifications are system generated messages that are triggered when a volunteer takes action, your volunteer opportunities are approved by the volunteer center, a team signs up, a password is reset and more.
- Feel free to use the editing tools in Email Notifications and create your own messaging. The fields in brackets are system generated so do not try and edit those unless you want to remove them.
- If you want to cc someone or set a receiver email to get these notifications, insert their email into receiver email or cc email

Advanced Configurations – Reminder Notifications

Reminder Notification Enable Disable

Please note: While each opportunity has its own configuration for when a particular notice is sent, all opportunities share the same text used for notifications.

Update [Volunteering Day Email](#) Notification Template

<input type="text" value="7"/> Days Before Volunteering Date <input checked="" type="checkbox"/> NA <input checked="" type="checkbox"/> Volunteer <input checked="" type="checkbox"/> Opportunity Owner	<input type="text" value="3"/> Days Before Volunteering Date <input checked="" type="checkbox"/> NA <input checked="" type="checkbox"/> Volunteer <input checked="" type="checkbox"/> Opportunity Owner
<input type="text" value=""/> On Volunteering Day <input checked="" type="checkbox"/> NA <input checked="" type="checkbox"/> Volunteer <input checked="" type="checkbox"/> Opportunity Owner	

- Email Reminder Notifications are also system generated reminders that are sent to volunteers for upcoming volunteer opportunities
- You can set two notifications for when you would like these reminders to be sent (days before) to your volunteers and then once on the Volunteering Day.
- Select Volunteer Opportunity Owner to send the message reminder to both the volunteer opportunity owner and the volunteer
- Edit your reminder message by clicking: [Volunteering Day Email](#)

Advanced Configurations – Reminder Notifications

My Associations Daniel Wainiel

Email Notification

Title: **Volunteering Date Reminder**

Sender Email: support@fundlyconnect.com

Sender Name: Fundly Connect

Subject: Volunteering Date Reminder

Active Additional Info

Content:

(EmailHeader)

Dear {VolunteerName},

This is a reminder that you are registered to participate in

{OpportunityName}

{StartDateTime}

{EndDateTime}

Location

{OpportunityLocation}

Location Details:

{OpportunityLocationMap}

Project Description: {ProjectDescription}

Please keep this email. It is the only place where you'll find the opportunity's address information.

If you have questions about this opportunity, please contact:

Opportunity Leader:

{Opportunity.CoordinatorEmail}

{Volunteer.CoordinatorEmail}

If for some reason you cannot participate, please let us know as soon as possible so another volunteer can take your place. Follow the link below and use the Log In button in the upper right hand corner. Then, go to the "My Account" tab where you can remove yourself from the "Upcoming Opportunities" section:

{LoginLink}

- You may edit the reminder notification that is sent to your volunteers here
- Changing the Sender Email will allow you to input your organization email if you'd like
- The message is templated where brackets exist so do not edit those unless you want the system fields removed. These are fields in the system that pull from database tables so the message can accurately fill in the Volunteer and Opportunity details

Basic Opportunities

Volunteer Opportunities— Basic Opportunities

Volunteer Opportunities

4 ACTIVE

4 INACTIVE

4 Record(s) Found

Opportunity Name	Date	Volunteers	Volunteer Awaiting Approval	Verified Hours	Unverified Hours	
Cleaning up Fairfax County Schools	2/20/2016 - 2/20/2016	2+	4	7.15	0	Edit
Program(s): Opportunity Owner: Daniel Wainiel Type: Basic						
Holiday Team Up	3/4/2016 - 3/4/2016	0+	0	0	0	Edit
Program(s): Opportunity Owner: Daniel Wainiel Type: Basic						
Step 123	12/11/2015 - 5/25/2018	1+	0	15	0	Edit
Program(s): Opportunity Owner: Daniel Wainiel Type: Basic						
The Working Tree	2/3/2016 - 3/3/2018	0+	0	0	0	Edit
Program(s): Opportunity Owner: Daniel Wainiel Type: Basic						

ADD VOLUNTEER

ADD OPPORTUNITY - BASIC

ADD OPPORTUNITY - ADVANCED

ADD HOURS

ADD BASIC OPPORTUNITY

ADD ADVANCED OPPORTUNITY

- Navigate to **Our Opportunities**
 - Your Opportunity Dashboard will highlight active opportunities and also bucket your inactive/past opportunities
 - From this screen you can:
 - edit an existing opportunity details
 - add volunteers to an opportunity
 - approve volunteers if approval is required
 - open a calendar view and filter
 - We will review the aforementioned features later
- ADD BASIC OPPORTUNITY**

Basic Volunteer Opportunities – Basic Info

Volunteer Opportunity-Festival Concessions Volunteer

1 Basic Info. 2 Requirements. 3 Publish

Opportunity Name: Festival Concessions Volunteer

Opportunity Owner: Me

Virtual Opportunity: Yes No

Location(s)

Address: 123 main street, Atl, GA, US, 30317

Opportunity Details

The fun you'll have volunteering at the [Shakey Knees festival](#)...Wow. A free show and you get to help concessions?



body p

Position(s)

Position

Name: Concessions Manager

Hourly Value: 12

Save Save And Add New Close

Schedule

One Time Ongoing

Start Date: 4/3/2016

Shift

Shift Name: All Day Festival Shift

Start Time: 8:00 AM

OR Flexible Time

End Time: 5:00 PM

SAVE & NEXT

- Fill out your opportunity name, location, details about the opportunity, and schedule
- You can input pictures and content in the **Opportunity Details** to make the opportunity come alive
- Create multiple **Positions** for opportunities
Tip: associate an hourly value to positions for reporting purposes to track \$ impact
- A **Basic Opportunity** includes basic scheduling: One-time or Ongoing Opportunities and single location
- A **Basic Opportunity** includes one shift (ex: Morning, Afternoon, All Day)

Basic Volunteer Opportunities— Requirements

Volunteer Opportunity-Festival Concessions Volunteer

1 Basic Info. 2 Requirements 3 Publish

Search parameters appropriate for this opportunity

Keywords

Adult (18-54) x Sports & Recreation x Other x Female x Male x All ages x Seniors (55 & Over) x
 Children & Youth (under 18) x Adults (18-54) x Civic & Community x Event Management x Freebie x
 Festival Concessions Volunteer x

Type to add or select keywords
If you want to create new Keyword, please press enter key after you write.

Causes: Civic & Community + 1 selected

Skills: Event Management

Activity Type: Event Organizing

Volunteer can schedule for this opportunity

Display on Public Calendar

Volunteer can log hours for this opportunity

Approval required for volunteer application

Who will be benefited by this opportunity?

Age Group: Adult (18-54) + 3 selected

Population: Other

Gender: Male + 1 selected

Appropriate for which type of volunteers

Age of volunteer: Adults (18-54)

Groups/Teams are allowed to apply this opportunity

Team Member(s)' information required for this opportunity

Associate Application Form

Application Form: App 1 [EDIT] [ADD]

Auto Check Out Type:

Auto Log Hours When Marked As Attended

- Type in some keywords for your opportunity. Other keywords will automatically be added based on your opportunity title and settings
- Associate a Cause, Skills, and Activity Type to the opportunity
- Define 'Who Benefits' and what age range should apply
- Toggle on/off if teams can apply and whether or not you need their Name, Email, Phone details upon signup
- Always toggle **Display on Public Calendar** if you want the opportunity to post to the Volunteer Center Portal

Basic Volunteer Opportunities— Requirements

Volunteer Opportunity-Festival Concessions Volunteer

1 Basic Info. 2 Requirements 3 Publish

Search parameters appropriate for this opportunity

Keywords: Adult (18-54) Sports & Recreation Other Female Male All ages Seniors (55 & Over) Children & Youth (under 18) Adults (18-54) Civic & Community Event Management Freebie Festival Concessions Volunteer

Causes: Civic & Community + 1 selected

Who will be benefited by this opportunity?

Age Group: Adult (18-54) + 3 selected

Population: Other

Gender: Male + 1 selected

Appropriate for which type of volunteers

Age of volunteer: Adults (18-54)

Groups/Teams are allowed to apply this opportunity

Team Member(s) information required for this opportunity

Associate Application Form

Application Form: App 1 [EDIT] [ADD]

Auto Check Out Type: [dropdown]

Auto Log Hours When Marked As Attended

Volunteer can schedule for this opportunity

Display on Public Calendar

Volunteer can log hours for this opportunity

Approval required for volunteer application

Orientation and/or training is required before volunteer can work

- Volunteer can schedule for this opportunity allows a volunteer to confirm the dates/shifts/positions they want to volunteer
- Volunteer can log hours for this opportunity allows a volunteer to input their own time volunteered
- Approval Required for volunteer application means your organization must review and approve the volunteers application before they can volunteer
- Orientation/Training Required means the volunteer must have been marked as attended to a training session before scheduling that volunteer for the opportunity

Basic Volunteer Opportunities— Requirements, Application Forms

Volunteer Application Form - Festival Application - Concessions Volunteers

Name:

Name

First Name:

Last Name:

Email

Mobile Phone

Additional Volunteer Information

How often do you volunteer?:

Custom Data Set

Additional Volunteer Information

Form Fields		
Name	Email	Mobile Phone
Address	Interest Areas	Gender
Birth Date	Emergency Contact Info	Custom Data Set
Volunteer Agreement		

- Add an Application Form to your Opportunity in Requirements to capture more info on your volunteers at signup
- Title your Form, and begin by adding fields that you want to capture
- Adding a Custom Data Set from form fields allows you to insert the questions you created in Configurations → Custom Data Sets and embed them in the opportunity application form
- You can also create your forms by opening the main menu and navigating to

[Opportunities](#)
Design Application Form
 Our Opportunities

Basic Volunteer Opportunities– Requirements

Volunteer Opportunity-Festival Concessions Volunteer

1 Basic Info. 2 Requirements 3 Publish

Search parameters appropriate for this opportunity

Keywords

Adult (18-54) x Sports & Recreation x Other x Female x Male x All ages x Seniors (55 & Over) x
 Children & Youth (under 18) x Adults (18-54) x Civic & Community x Event Management x Freebie x
 Festival Concessions Volunteer x

Type to add or select keywords
If you want to create new Keyword, please press enter key after you write.

Causes: Civic & Community + 1 selected
 Skills: Event Management
 Activity Type: Event Organizing

Who will be benefited by this opportunity?

Age Group: Adult (18-54) + 3 selected
 Population: Other
 Gender: Male + 1 selected

Appropriate for which type of volunteers

Age of volunteer: Adults (18-54)
 Groups/Teams are allowed to apply this opportunity
 Team Member(s)' information required for this opportunity

Associate Application Form

Application Form: App 1 [EDIT] [ADD]
 Auto Check Out Type: [dropdown]

Auto Log Hours When Marked As Attended

Volunteer can schedule for this opportunity
 Display on Public Calendar
 Volunteer can log hours for this opportunity
 Approval required for volunteer application

- The last requirement we'll cover is **Auto Log Hours When Marked As Attended**
- This relates to volunteer management and logging of volunteer hours. With this setting turned on, if you mark a volunteer's attendance as "Attended" the system will auto log that volunteer's shift hours so you do not need to manually put in how long they volunteered
- Auto Check Out Type will not be covered in this guide – it is a setting for an add on product called Time It! for volunteer check-in

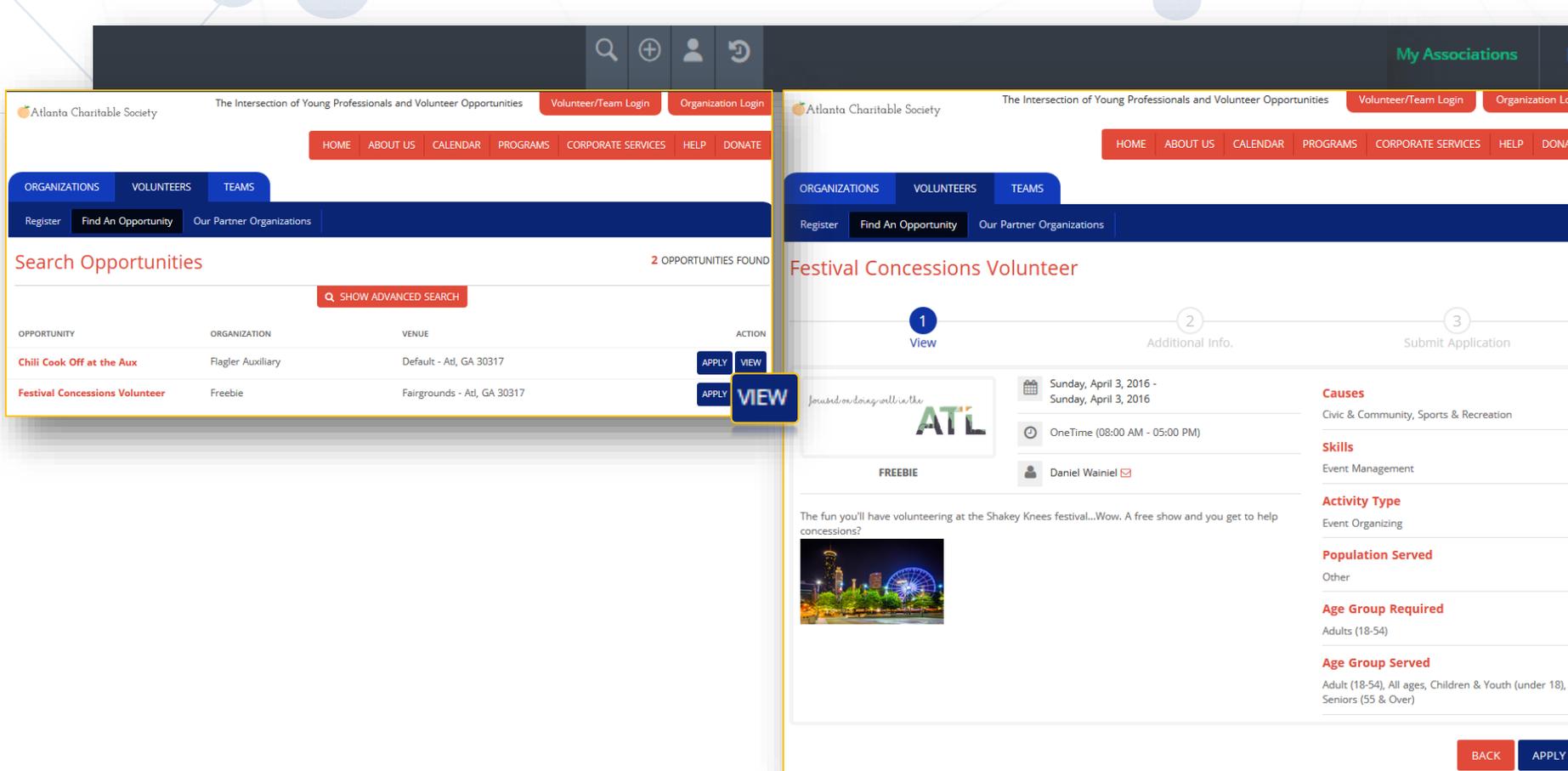
Basic Volunteer Opportunities— Publish to Volunteer Center

3

- It's time to Publish to the "Action Center" - the Volunteer Center's Public Portal
- If you are associated to more than one volunteer center using Fundly Connect it will show here
- Programs that the Volunteer Center offers are optional selections that you may wish to associate your opportunity with
- The status of your post will be listed here – Pending, Published
- You can verify your associations and status with the Volunteer Center [My Associations](#)

Make sure the Volunteer Center is

Basic Volunteer Opportunities—Opportunity Posting



The screenshot displays the Fundly Connect interface for posting a volunteer opportunity. The left panel shows the search results for 'Festival Concessions Volunteer' at the Atlanta Charitable Society. The right panel shows the detailed view of this opportunity, including dates, location, and contact information.

Search Results:

OPPORTUNITY	ORGANIZATION	VENUE	ACTION
Chili Cook Off at the Aux	Flagler Auxiliary	Default - Atl, GA 30317	APPLY VIEW
Festival Concessions Volunteer	Freebie	Fairgrounds - Atl, GA 30317	APPLY VIEW

Opportunity Details: Festival Concessions Volunteer

1 View 2 Additional Info. 3 Submit Application

ATL
FREEBIE

Founded on days will in the

Sunday, April 3, 2016 - Sunday, April 3, 2016

OneTime (08:00 AM - 05:00 PM)

Daniel Wainiel

Causes
Civic & Community, Sports & Recreation

Skills
Event Management

Activity Type
Event Organizing

Population Served
Other

Age Group Required
Adults (18-54)

Age Group Served
Adult (18-54), All ages, Children & Youth (under 18), Seniors (55 & Over)

BACK APPLY

- Navigate to the Volunteer Center's Public Portal
- Search All Opportunities and View your opportunity Festival Concessions Volunteer
- Your opportunity has been successfully published
- Some Volunteer Centers require approval when processing opportunities from their partner nonprofits. If this scenario exists, your opportunity posting will be 'approved' by the Volunteer Center and subsequently posted to the site once they have reviewed

Advanced Opportunities

Advanced Volunteer Opportunities - Basic Info



Volunteer Opportunity-Festival Garbage Clean Up

1 Basic Info. 2 Requirements 3 Scheduling And Shift 4 P

ADD VOLUNTEER
ADD OPPORTUNITY - BASIC
ADD OPPORTUNITY - ADVANCED
ADD HOURS

Opportunity Name: Festival Garbage Clean Up

Opportunity Owner: Me

Position(s)
Garbage Cleanup - Crowd Garbage Cleanup - Vendors ADD POSITION

Location(s)

Address	Edit
Shakey Trees Festival Main Stage 123 main street, Atl, GA, US, 30317	Edit
Shakey Trees Festival West Stage Atlanta, Fulton, Georgia, US	Edit

ADD LOCATION

Opportunity Details

This is an incredible opportunity to see live music for free and help the City of Atlanta clean up after the madness of Shakey Trees Festival

body p

My Associations Daniel Wainiel

Active Inactive

- Advanced Opportunities include advanced scheduling and shifts, as well as multi locations
- Create another opportunity similar to the first one, but create one that will have shifts, weekly recurrences, multi locations, and multi positions
- Go through Requirements like we did in Basic Opportunities and move on to Step 3 to fill out your scheduling and shift information
- Try using a different application form for this opportunity

Advanced Volunteer Opportunities - Requirements



My Associations

Daniel Wainiel

- 1 Basic Info.
- 2 Requirements
- 3 Scheduling And Shift
- 4 Publish

Search parameters appropriate for this opportunity

Keywords

Environment x Adults (18-54) x Event Management x Freebie x

Festival Garbage Clean Up x Crushing It x

Type to add or select keywords

If you want to create new Keyword, please press enter key after you write.

Who will be benefited by this opportunity?

Age Group:

Population:

Gender:

Appropriate for which type of volunteers

Age of volunteer:

Groups/Teams are allowed to apply this opportunity

Team Member(s)' information required for this opportunity

Associate Application Form

Application Form:

Auto Check Out Type:

Auto Log Hours When Marked As Attended

- Volunteer can schedule for this opportunity
- Display on Public Calendar
- Volunteer can log hours for this opportunity
- Approval required for volunteer application
- Orientation and/or training is required before volunteer can work

- In this opportunity we've turned off Team Member(s)' information required for this opportunity meaning that when a team captain applies a team to volunteer, he/she does not need to insert the names and emails of others on the team
- We've also made it so Volunteers can schedule and log hours for the opportunity, but we are requiring approval of volunteer applications

Advanced Volunteer Opportunities— Scheduling and Shift

Volunteer Opportunity-Festival Garbage Clean Up

1 Basic Info. 2 Requirements 3 Scheduling And Shift 4 Publish

Schedule for: **Shakey Trees Festival Main Stage**

One Time **Weekly** Monthly Ongoing Other

2/20/2016 2/20/2017

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Every	<input checked="" type="checkbox"/>						
First	<input checked="" type="checkbox"/>						
Second	<input checked="" type="checkbox"/>						
Third	<input checked="" type="checkbox"/>						
Fourth	<input checked="" type="checkbox"/>						
Fifth	<input checked="" type="checkbox"/>						
Alternate	<input checked="" type="checkbox"/>						

Schedules

Regular Location: Shakey Trees Festival Main Stage Starts from 02/18/2016 to 02/18/2016. Occurs on Every Fri. Edit

ADD SHIFT VIEW SHIFT (2)

Regular Location: Shakey Trees Festival West Stage Starts from 02/20/2016 to 02/20/2017. Occurs on Every Fri. Edit

ADD SHIFT VIEW SHIFT (2)

Add/Edit Shift

Shift Name: Shift Days:

Start Time:

End Time:

OR Flexible Time

Positions - Volunteer Required

Add/Edit Shift

Crowd

Shift Name: Shift Days:

Start Time:

End Time:

OR Flexible Time

Positions - Volunteer Required

Garbage Cleanup - Crowd

Garbage Cleanup - Vendors

Save Save And Add New Cancel

- Select the scheduling for your first location: **Main Stage**
- This event is Weekly, every Friday from 2/20/16-2/20/17
- Once you input your schedule it is time to create shifts for your positions
- Create a Morning and Afternoon Shift for this location and input the number of volunteers needed by position
- Repeat for second location: **West Stage**
- You should have 2 schedules with 2 positions, and 2 shifts for each, then go **Publish!**

Advanced Opportunities—Opportunity Posting

The screenshot shows the Fundly Connect interface. At the top, there's a navigation bar with 'My Associations' and 'Daniel Wainiel'. Below that, a search bar and navigation tabs for 'ORGANIZATIONS', 'VOLUNTEERS', and 'TEAMS' are visible. The main content area displays 'Festival Garbage Clean Up' with a progress indicator (1 View, 2 Additional Info., 3 Submit Application). A table lists opportunities, with 'Festival Garbage Clean Up' highlighted. A 'SCHEDULES' modal is open, showing details for 'Shakey Trees Festival Main Stage' and 'Shakey Trees Festival West Stage'. The detailed view of the opportunity includes dates, a 'View Schedules' button, and a list of causes, skills, activity types, and age groups. A photo of a festival cleanup is shown at the bottom.

OPPORTUNITY	ORGANIZATION	VENUE	ACTION
Chili Cook Off at the Aux	Flagler Auxiliary	Default - Atl, GA 30317	APPLY VIEW
Festival Concessions Volunteer	Freebie	Fairgrounds - Atl, GA 30317	APPLY VIEW
Festival Garbage Clean Up	Freebie	Multiple Venues	APPLY VIEW

- Now view Festival Garbage Cleanup Opportunity
- Notice for the advanced opportunity there are multiple venues/schedules
- The volunteer can message the coordinator from this screen and review the opportunity details
- All of the Opportunity Details you setup earlier show up on the Volunteer Center's public site

Scenario 1

Scenario #1

My Volunteering Dashboard PIN - A00000275

11

HOURS LOGGED

6

OPPORTUNITIES WORKED

2

OPPORTUNITIES PENDING APPROVAL

My Opportunities				
Race for MS	0	0	Scheduling	✉
Festival Garbage Clean Up	4	0	Log Hours	✉
Grading SCORE Tests	0	0	Scheduling	✉
Front Desk Volunteer	3	0	Log Hours	✉



- Mike has been finding volunteer opportunities through the volunteer center for many years. He is excited for a new dashboard and the ability to better manage his volunteer calendar
- Mike is very selective with the organizations he works with and has affinities for music and environmental preservation
- Mike also leads a team of accounting volunteers, The CPAs
- He sees an opportunity on the Volunteer Center Portal to volunteer at an upcoming festival that your nonprofit is sponsoring...

My Team Dashboard Delta CPAs | Edit Team | Manage Documents

Summary		Team Captain Details	Team Co-Captain Details
0	Hours Logged	Mike Wain Change	NA Change
0	Opportunities Worked	✉ dawolffy@gmail.com	
7	Members	📞 8434120039	

Scenario #1 - Volunteer Application



ORGANIZATIONS VOLUNTEERS TEAMS

Register Find An Opportunity Our Partner Organizations

Festival Garbage Clean Up

1 Additional Info. 3 Submit Application

Thursday, February 18, 2016 - Monday, February 20, 2017

View Schedules

Causes: Environment

Skills: Event Man...

Activity: Event Org...

Age Gro...: Adults (18...

ATL

FREEBIE

Daniel Wainiel

APPLY

TEAM SELECTION

Apply As Individual Apply As Team

Next

Submit Application - Festival Garbage Clean Up

1 View 2 Ad... 3 Submit Application

Name: First Name (Mike), Last Name (Wain)

Email: dawolffy@gmail.com

Mobile Phone: 8434120039

BirthDate: 2016/01/13 00:00:00

LOGIN

MikeWain

.....

Login Signup

Forgot Username/Password?

LOGIN USING SOCIAL MEDIA

f g+

1. Mike views your opportunity on the Volunteer Center Portal and it looks like a perfect fit
2. Mike clicks apply, logs in to Fundly Connect and Applies as an Individual
3. Mike is required to fill out fields in the form you configured for the opportunity (Name, Email, Phone, Custom Data Sets) and submits his application. Since he is already a user, many of the fields auto-fill for him

Submit Application - Festival Garbage Clean Up

1 View 2 Additional Info. 3 Submit Application

Once you submit your application, you can view the status and next steps for this volunteer opportunity from your Dashboard.

BACK TO SEARCH SUBMIT APPLICATION

Scenario #1 – Automated Message Sent



VOLUNTEER OPPORTUNITY APPLICATION NOTIFICATION

Dear **Freebie**,

Please review volunteer application for opportunity.

Information

Volunteer Name: [Mike Wain

Opportunity Name: Festival Garbage Clean Up

Please **process** the volunteer request.

Warm Regards,

- Your organization will receive an email notification informing you have a new volunteer to approve
- You can click on **Process** in the email and that will take you to your **Pending Volunteers** or simply login to your **Opportunity Dashboard**

Scenario #1 - Volunteer Approval

Volunteer Opportunities Filter

6

ACTIVE

4

INACTIVE

Opportunity Name	Date	Volunteers	Volunteer Awaiting Approval
Cleaning up Fairfax County Schools <small>Program(s) : Opportunity Owner : Daniel Wainiel Type : Basic</small>	2/20/2016 - 2/20/2016	2+	4
Festival Concessions Volunteer <small>Program(s) : Opportunity Owner : Daniel Wainiel Type : Basic</small>	4/3/2016 - 4/3/2016	0+	5
Festival Garbage Clean Up <small>Program(s) : Opportunity Owner : Daniel Wainiel Type : Advanced</small>	2/18/2016 - 2/20/2017	0+	1

- You login to your opportunity dashboard and see a new volunteer awaiting approval
- Setting from page 18

Approval required for volunteer application

enforces you to approve the application for volunteers
- Click on your volunteers awaiting approval 1 to approve your Festival Garbage Clean Up volunteer (Mike Wain)

Scenario #1 - Volunteer Approval Continued

My Associations Daniel Wainiel

Pending Volunteers

Name	Application Type	Application Date	Action
Mike Wain ✉ dawolffy@gmail.com	Individual	2016/02/19 00:45:22	Approve

Message

Application Form is associated with this opportunity. Would you like to reiew application form?

Yes No

Festival Garbage Clean Up 2/18/2016 - 2/20/2017 1 + 0 0 0 Edit

Program(s): | Opportunity Owner: Daniel Wainiel | Type: Advanced

1. Select **Approve** to make the pending volunteer an active volunteer
2. Review the volunteer application form if you'd like
3. Go back to Your Opportunity List and click **Festival Garbage Cleanup** or on the **Active Volunteer** number 1
4. This will open up scheduling, check-in and logging hours volunteer management for your opportunity

Scenario #1 – Volunteer Scheduling

Search, +, User, Refresh icons | My Associations | Daniel Wainiel | Menu icon

Festival Garbage Clean Up Manage Opportunity

Manage Volunteers | Attendance

Volunteer Management - Festival Garbage Clean Up

Name	Application Type	Next Step	Hours Volunteered	Unverified Hours
Mike Wain	Individual	Scheduling	0	0

8434120039 | dawolffy@gmail.com

You now need to schedule the volunteer for the opportunity

1. Click on Scheduling and select the Venue, Shift, Position
2. Remember we set up the opportunity for a weekly Friday occurrence.
3. Schedule availability by date to pull up a list of Friday dates

Festival Garbage Clean Up

Venue: Shakey Trees Festival Main Stage

Shift: Morning

Position: Garbage Cleanup - Crowd

Starts from 02/19/2016 to 02/19/2017. Occurs on Every Fri from 08:00 AM to 12:00 PM

Availability: Day of Week Date Set Dates

From Time: 8:00 AM

Till Time: 12:00 PM

Set Volunteering Dates

2/19/2016 2/19/2017 Search

<input type="checkbox"/> 2/19/2016	<input type="checkbox"/> 2/26/2016	<input checked="" type="checkbox"/> 3/4/2016
<input type="checkbox"/> 3/11/2016	<input checked="" type="checkbox"/> 3/18/2016	<input type="checkbox"/> 3/25/2016
<input type="checkbox"/> 4/1/2016	<input type="checkbox"/> 4/8/2016	<input type="checkbox"/> 4/15/2016
<input type="checkbox"/> 4/22/2016	<input type="checkbox"/> 4/29/2016	<input type="checkbox"/> 5/6/2016
<input type="checkbox"/> 5/13/2016	<input type="checkbox"/> 5/20/2016	<input type="checkbox"/> 5/27/2016

Save

Scenario #1 – Logging Hours

Search: Festival Garbage Clean Up Manage Opportunity

Volunteer Management - Festival Garbage Clean Up

Name	Application Type	Next Step	Hours Volunteered	Unverified Hours
Mike Wain 8434120039 dawolffy@gmail.com	Individual	Log Hours	8	0

Remove Volunteer

Log Details ✕

Assignment: Shakey Trees Festival Main Stage | Morning | Garbage Cleanup - Crowd

Date	Description	Hours
3/4/2016 from 08:00 AM to 12:00 PM	Volunteer confirmed	4
3/11/2016 from 08:00 AM to 12:00 PM	Volunteer Confirmed	4

- Now we are logging hours for Mike, and the volunteer assignments/dates appear on screen that you can log hours for.
- If Opportunity Setting Volunteer can log hours for this opportunity is turned on, the volunteer can log their own hours from their dashboard.
- The other way to log hours is to click on Attendance and check the volunteer into their scheduled shift for a specific date...

Scenario #1 - Attendance

Festival Garbage Clean Up Manage Opportunity

Attendance 3/4/2016 Get Attendees

2 Record(s) Found

Volunteer	Location	Shift	Position	
Volunteer	Select Location	Select Shift		
<input type="checkbox"/> NO SHOW <input checked="" type="checkbox"/> ATTENDED	Dan Wain	Shakey Trees Festival West Stage	Afternoon	Garbage Cleanup - Crowd
	Mike Wain	Shakey Trees Festival Main Stage	Morning	Garbage Cleanup - Crowd

- Another volunteer management action we can take is checking in volunteers as attended or no shows. When you click that a volunteer has **Attended** the volunteer shift, their hours are Auto Logged. (Setting on page 20)

Auto Log Hours When Marked As Attended
- You will need to click **Get Attendees** once you search by date. You can sort by location, shift, or you check in volunteers by name search once you've established your date. if you hover over the check in window, you also have a no show option which logs 0 hours for the volunteer

Scenario #2

Scenario #2 – Team Volunteer Application

6

Navigation bar with search, user profile, and menu icons. Text: My Associations, Daniel Wainiel

1

LOGIN

MikeWain

.....

Login Signup

Forgot Username/Password?

LOGIN USING SOCIAL MEDIA

f g+

TEAM SELECTION

Apply As Individual Apply As Team

Delta CPAs 5

Next

Submit Application - Festival Garbage Clean Up

1 View 2 Submit Application

Please verify below details before you click Submit

Application Type: Group

Team Name: Delta CPAs CHANGE

Team Size: 5 CHANGE

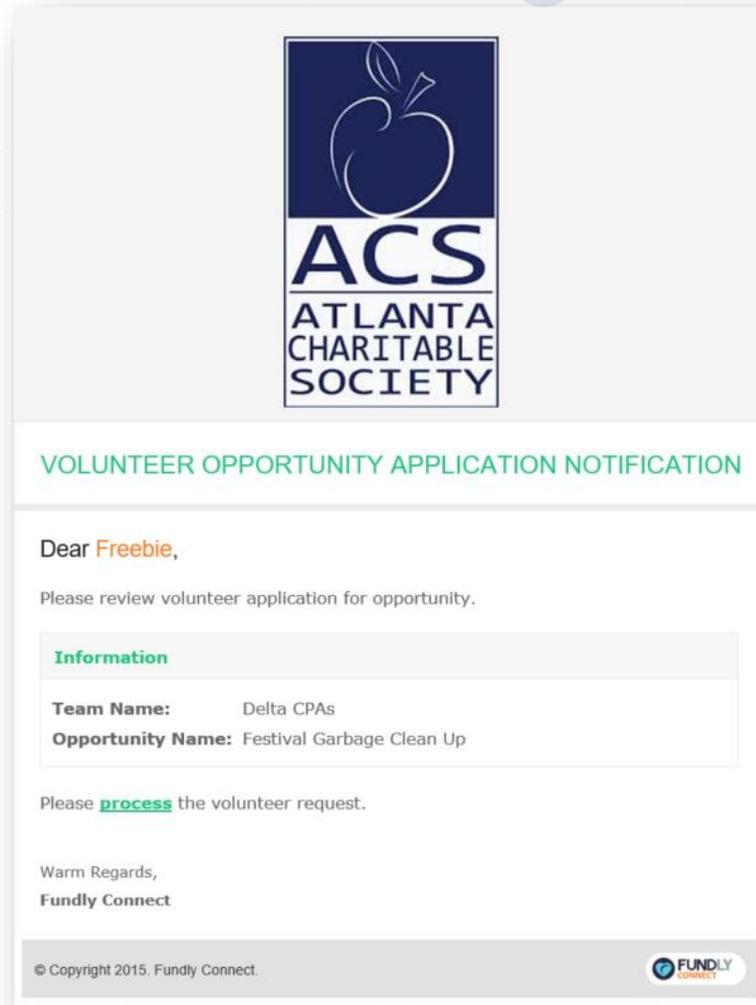
Once you submit your application, you can view the status and next steps for this volunteer opportunity from your Dashboard.

BACK TO SEARCH SUBMIT APPLICATION

1. This time Mike is applying his team, The CPAs for the volunteer opportunity
2. Mike selects the size of his team and submits the application
3. Notice the names and emails of the volunteers on his team are not required upon submittal for this opportunity (see page 32)

3

Scenario #1 – Automated Message Sent





VOLUNTEER OPPORTUNITY APPLICATION NOTIFICATION

Dear **Freebie**,

Please review volunteer application for opportunity.

Information

Team Name:	Delta CPAs
Opportunity Name:	Festival Garbage Clean Up

Please **process** the volunteer request.

Warm Regards,
Fundly Connect

© Copyright 2015. Fundly Connect. 

- Your organization will receive an email notification informing you have a new team to approve
- You can click on **Process** in the email and that will take you to your **Pending Volunteers** or simply login to your **Opportunity Dashboard**

Scenario #2 – Team Volunteer Application

Name	Application Type	Application Date	Action
Delta CPAs	Team (5)	2016/02/24 04:29:35	Approve

Member Name	Email	
Team Member 1		Edit
Team Member 2		Edit
Team Member 3		Edit
Team Member 4		Edit
Team Member 5		Edit

- You can now approve the team. If you click the (5) you will be able to enter in team member names if they are volunteer records in your Fundly Connect database
- Oftentimes, teams won't know who is attending an opportunity and that is why you would select this setting
- Proceed with scheduling your Team for the opportunity just like you would an individual

Scenario #2 – Team Volunteer Application

Navigation bar with search, add, user, and refresh icons. Text: My Associations, Daniel Wainiel, and a green menu button.

Festival Garbage Clean Up Manage Opportunity

Attendance 3/4/2016 Get Attendees

5 Record(s) Found

Volunteer	Location	Shift	Position
Volunteer	Select Location	Select Shift	
<input type="checkbox"/> NO SHOW	Dan Wain	Shakey Trees Festival West Stage	Afternoon
<input checked="" type="checkbox"/> CHECK IN	Delta CPAs		
<input checked="" type="checkbox"/> ATTENDED	Mike Wain		
<input type="checkbox"/> NO SHOW			
<input checked="" type="checkbox"/> ATTENDED	The NPE Devs		

Log Details

Hours: Hours Description: Description

From Date: From Date To Date: To Date

Save

Duration or Opportunity Schedule	Hours	Description
2/26/2016 to 2/26/2016	4	logged them!
2/26/2016 to 2/26/2016	4	worked hard
2/27/2016 to 2/27/2016	4	Festival Garbage Clean Up
3/4/2016 to 3/4/2016	4	Festival Garbage Clean Up

Save Close

- In Attendance, if you check in the Team, the status changes to **ATTENDED**
- Keep in mind the hours calculated when marking as attended will be the total shift time (4 hours) and not the team size (5) multiplied by 4 hours
- If you ever need to go in and edit a team's/individual's total hours volunteered, Select Manage Volunteers and click on the Hours Volunteered value then the Verified Hours value to pull up the Log Details

Orientations & Trainings

Orientations/Trainings– Create a Training Requirement



My Associations Daniel Wainiel

Training - Working with Youth

1 Basic Info 2 Scheduling 3 Publish Active Inactive

Name: Working with Youth Capacity: 20

Allow RSVP Cancellation by Volunteer Yes No

Location(s)

Kids4Kids HQ 123 main street, Atl, GA, US, 30317 Edit

Add Location

Training Details

Rich text editor with text: "This is a required training class for volunteers interested in volunteering at our Kids for Kids center. The 2 hour training allows you to gain valuable insight into our program and we teach you how to handle tense situations..."

- Training requirements are setup almost exactly like an opportunity, however, they are a precursor setting and requirement a volunteer must fulfill prior to volunteering
- Create a name for your training and a capacity as well as location
- Allow RSVP Cancellation by Volunteer Yes No will allow a volunteer to cancel a scheduled training from their dashboard
- Fill out your details/schedule and **Publish** to the Volunteer Center site
- Navigate to an opportunity you want to associate a training to

Orientations/Trainings– Associate a Training Requirement to an Opportunity

Volunteer Opportunity-Grading SCORE Tests

1 Basic Info. 2 Requirements 3 Scheduling And Shift 4 Publish

Search parameters appropriate for this opportunity

Keywords

Volunteer can schedule for this opportunity

Display on Public Calendar

Volunteer can log hours for this opportunity

Approval required for

Orientation and/or training is required before volunteer can work

Orientation/Training: Working with Youth

Who will be benefited by this opportunity?

Age Group: Select AgeGroup(s)

Population: Select Population(s)

Gender: Select Gender(s)

Appropriate for which type of volunteers

(s)

allowed to apply this

- On step 2 of your opportunity, turn on: Orientation and/or training is required before volunteer can work
- Select the training you want to associate with your opportunity and save
- When the volunteer applies to an opportunity they will now see this training requirement
- On the Volunteer Center Opportunity Calendar you will see a list of trainings as well

Orientations/Trainings— Public Calendar RSVP

Calendar

SEARCH SHOW ADVANCED SEARCH

February 2016 2/23/2016 GO DAY WEEK MONTH

Filter: Recurring Ongoing Onetime Legend: Opportunity Training

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
31	1	2	3	4	5	6
	7	8 General Training 08:00 AM - 09:00 AM	9			
14	15 General Training 08:00 AM - 09:00 AM	16				
21	22 General Training 08:00 AM - 09:00 AM Working with Youth 09:00 PM - 11:00 PM	23				

VIEW DETAILS

Working with Youth

Freebie Training

This is a required training class for volunteers interested in volunteering at our Kids for Kids center.
The 2 hour training allows you to gain valuable insight into our program and we teach you how to handle tense situations...

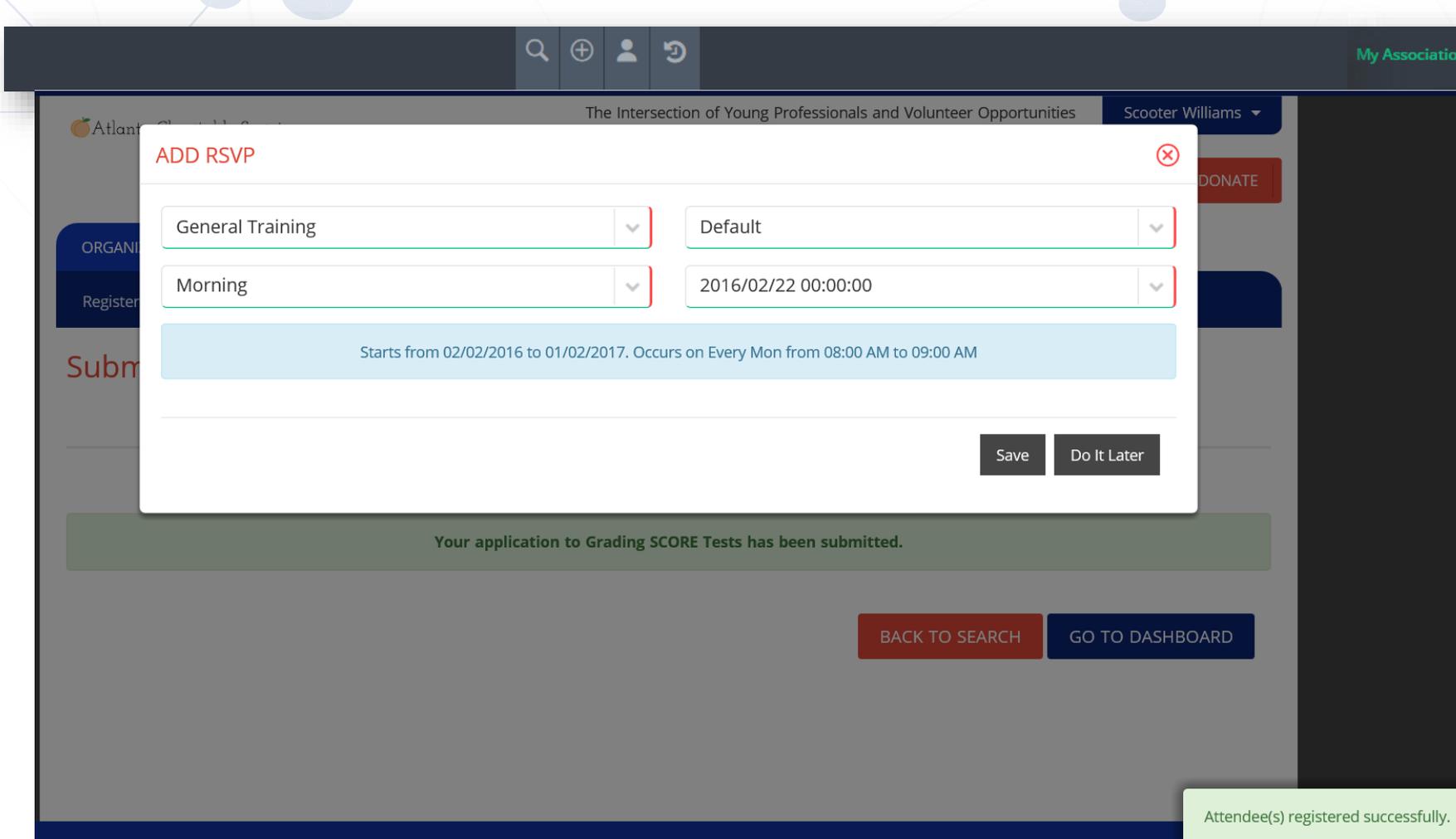
SHIFT	LOCATION	RSVP LIMIT	SPOTS REMAINING	RSVP
09:00 PM - 11:00 PM	123 main street, Atl, US - 30317	20	19	RSVP

Close

- A volunteer could search the Volunteer Center Portal for your Training dates and RSVP to a specific training date
- The calendar can be filtered by opportunities and/or trainings to make it easier for volunteers to find your published activities
- When the volunteer clicks [RSVP](#) they will be asked to login and then successfully RSVP for the training
- An RSVP with training dates will also appear when a volunteer applies to an opportunity normally (without going to the calendar)

Scenario #3

Volunteer Opportunities—Scenario #3 Volunteer Management (Training Required)



The screenshot shows a web application interface with a dark header. The header includes a search icon, a plus icon, a user icon, and a refresh icon. On the right, it says "My Associations" and "Daniel Wainiel" with a dropdown arrow. A green menu icon is also present. The main content area shows a modal window titled "ADD RSVP" with a close button (X). The modal contains four dropdown menus: "General Training", "Default", "Morning", and "2016/02/22 00:00:00". Below these is a light blue bar with the text "Starts from 02/02/2016 to 01/02/2017. Occurs on Every Mon from 08:00 AM to 09:00 AM". At the bottom of the modal are "Save" and "Do It Later" buttons. Below the modal, a green notification bar says "Your application to Grading SCORE Tests has been submitted." At the bottom of the page, there are "BACK TO SEARCH" and "GO TO DASHBOARD" buttons. A green notification bar at the bottom right says "Attendee(s) registered successfully."

1. Scenario: Volunteer logs in and applies for opportunity that requires training prior to volunteering. A pop up window appears to Add RSVP
2. Volunteer selects from the list of available training times and hits save OR they can RSVP to a training date/time later from their dashboard
4. Once the Training has been marked as attended by your organization you can schedule the volunteer for the opportunity

Volunteer Opportunities— Volunteer Scenario #3 (Training Required)

Grading SCORE Tests Manage Opportunity

Volunteer Management - Grading SCORE Tests

Name	Application Type	Next Step 3	Hours Volunteered	Unverified Hours
Dan Wain 8434120049 dan.wain1@gmail.com	Individual	Pending Orientation & Training → Pending Attendance	0	0
Mike Wain 8434120049	Individual	Scheduling	0	0

1. Scenario: Someone at your organization schedules the Training for the volunteer
2. Click on your Opportunity volunteer, Select Pending Orientation & Training and Add RSVP for the volunteer training location, shift, etc.
3. The Next Step changes from Scheduling to Pending Orientation & Training to Pending Attendance
4. Click on Pending Attendance, View RSVP window opens, mark the volunteer as Attended
5. Proceed with scheduling the volunteer for the opportunity

Add Rsvp 2

Training: Working with Youth

Location: Select Location

Shift: Select Shift

Date: Select Date

View Rsvp

Training Name	Location	Shift	Schedule Date	Attended
Working with Youth	Kids4Kids HQ	Night	2/29/2016	Yes <input checked="" type="checkbox"/> No

Save Close

Communication

Volunteer Communication

Navigation bar with icons for search, add, user, and refresh. Includes 'My Associations' and 'Daniel Wainiel' dropdown menu, and a green menu icon.

Setup Communication

1 Setup Communication | 2 Select Recipients | 3 Confirm

Name: Dan
 Sender Email: Dan.wain@fundly.com
 Recipients Type: Volunteer

Sender Name: Dan Wain
 Subject: A New System, Fundly Connect!

Communication Template

Monthly Newsletter | Preview | Create New Template | Edit Template

Attachment

Click here OR Drop file here
 Supported file types: jpg, jpeg, bmp, png, gif, txt, doc, d

File Name

Newsletter Template

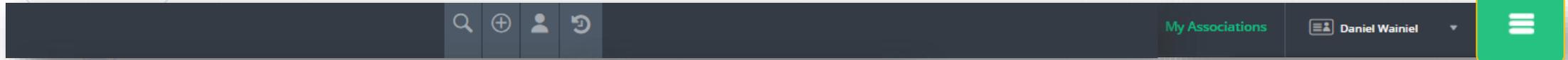
✓ 🔍

Newsletter Template

✓ 🔍

- Open up the main menu and navigate to Communication Center Create New
- Fill out your sender info/subject
- Recipients Type will always be volunteer
- Create a New Template for your newsletter and select that template once completed (more on next page)
- Select one of the two provided templates (more on next page)
- Attach a file up to 4MB

Volunteer Communication



Home | About Us | Contact Us

LOGO
150px x 60px



Image Size: 600px(width) X 300px(height)

WIDGETS LAYOUT

- BUTTON
- DIVIDER
- IMAGE
- IMAGE TEXT BUTTON
- SOCIAL MEDIA
- TEXT
- TWO COLUMN

Your Heading Goes Here
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor.

280 x 140

CLICK ME

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla in purus accumsan, pharetra augue sit amet, laoreet neque. Praesent in porttitor quam. Vivamus dapibus ex in ornare volutpat. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec ac massa tristique, pulvinar neque egetas, scelerisque ipsum. Nullam volutpat eros lacinia quam posuere varius eu quis enim. Praesent cursus ornare lectus a facilisis. Ut nec dui at ante auctor molestie sed nec elit. Suspendisse a faucibus felis. Lorem ipsum dolor sit

- Wait 5-10 seconds for your template to load
- Drag and drop widgets into your newsletter, upload your logo, change colors, content, and layout
- Make sure to name and save your newsletter for future use
- This is built in functionality similar to Mailchimp

Volunteer Communication

Navigation: My Associations | Daniel Wainiel

Select Recipients

1 Setup Communication | 2 Select Recipients | 3 Confirm

Following are the default filters applied to your newsletter recipient list.

- Communication Preferences is Email
- Primary Email Exists

There are 6 recipient(s) on this search criteria. Click on count to view all.

Build your recipient list using search filters below

Match: All of the following rules:

- Select Criteria---
- Select Operator---
- Add Sub Group

Match: All of the following rules:

- City: Atlanta
- In: Atlanta
- Add Sub Group

Match: All of the following rules:

- Gender: Female
- In: Female
- Type to select

- It's time to select our newsletter recipient list
- The default will send to all volunteers with an email and communication preferences turned on
- If you want to get granular, you can select filters to build a segment
- **Ex:** All Female Volunteers living in Atlanta
- You can also add recipients individually
- Save and Proceed to the next step

Volunteer Communication

Navigation bar with search, add, user, and refresh icons. Text: My Associations Daniel Wainiel



Confirm

1 Setup Communication 2 Select Recipients 3 Confirm

You are all set to send your Communication to 6 recipients!

There are 6 recipients matching your search filter .

Subject line of your Communication is "A New System. Fundly Connect!".

Send a Test email:

0 Other recipients included.

- Send a test email to yourself if you want to double check your work
- Send now or Send On a certain date/time
- Proceed to Communication History

Confirm ✕

Send Now Send On

Schedule Date:

Volunteer Communication

Navigation bar with icons for search, add, user, and refresh. On the right, it shows 'My Associations', 'Daniel Wainiel', and a green menu icon.

Communication History | Search [] | From []

Subject	Schedule Date	Status
You are appreciated...Volunteers!	2/22/2016	PendingSearch
January Volunteer Updates	1/18/2016	Completed

Context menu for the 'Completed' row:

- Edit
- View Summary
- Copy

Summary

3 Recipients Preview

Subject: January Volunteer Updates
Delivered: 1/18/2016

Open rate % Click rate %

2 Opened	0 Clicked	0 Bounced <small>(0 Hard Bounced + 0 Soft Bounced)</small>	0 Unsubscribed
----------	-----------	---	----------------

3 Successful deliveries | 14 Total opens | 0 Total clicks | 0 Spam Complaints

- Once the email has been **Completed**, click on **View Summary** for the communication
- You will get email metrics that detail who is opening, clicking, bouncing, and unsubscribing from your newsletter
- You may also copy communications for future messaging that is similar

Reports and Miscellaneous

Reporting

Navigation bar with search, add, user, and refresh icons. Includes 'My Associations' and 'Daniel Wainiel' dropdown menu, and a green menu icon.

- Opportunity Reports
- Program Reports
- Training Reports
- Volunteer Reports

Report selection area with 'DEFAULT \ OPPORTUNITY REPORTS' header. Includes 'Attendance' and 'Hours by opportunity' options, an 'Execute' button, and an information icon.

Hours By Opportunity				
Helping Folks				
PIN Number	Volunteer Name	Date	Email	Verified Hours
B000000031	Amanda Wain	12/09/2015	dan.wain_6@fundly.com	10
A000000288	Danny Wain	12/09/2015	dan.wain@fundly.com	4
			Total Hours	14
Step 123				
PIN Number	Volunteer Name	Date	Email	Verified Hours
A000000268	Danielle Waine	12/14/2015	Waine	15
			Total Hours	15
Help us get started				
PIN Number	Volunteer Name	Date	Email	Verified Hours
B000002342	dan wain	02/03/2016		4
A000000259	Dan Wain	02/03/2016	dan.wain1@gmail.com	12.62
			Total Hours	16.62
Cleaning up Fairfax County Schools				
PIN Number	Volunteer Name	Date	Email	Verified Hours
B000002349	Nicole Baker			
B000002351	Rick Spitz	02/20/2016		5.01
B000002343	Delta CPAs			
B000000008	Dani Wynne	02/20/2016	dan.wain+1@fundly.com	2.14
			Total Hours	7.15
Festival Concessions Volunteer				
PIN Number	Volunteer Name	Date	Email	Verified Hours
B000002343	Delta CPAs			
			Total Hours	0
Festival Garbage Clean Up				
PIN Number	Volunteer Name	Date	Email	Verified Hours
B000002343	Delta CPAs	02/26/2016		4
B000002343	Delta CPAs	02/26/2016		4
B000002343	Delta CPAs	02/27/2016		4
B000002343	Delta CPAs	03/04/2016		4
B000002343	Delta CPAs	03/25/2016		4
B000002343	Delta CPAs	05/06/2016		4
A000000259	Dan Wain	03/04/2016	dan.wain1@gmail.com	0
A000000275	Mike Wain	03/04/2016	dawolffy@gmail.com	0
A000000275	Mike Wain	03/11/2016	dawolffy@gmail.com	4
A000000275	Mike Wain		dawolffy@gmail.com	
A000000300	YOPros	02/27/2016		7.91
A000000300	YOPros	03/04/2016		7.91

- Execute as HTML
- Execute as Excel
- Execute as RTF
- Execute as CSV
- Schedule
- Copy

- Out of the box Default Reports are constantly being added. Click on the type of report you are looking to run and hit Execute
- If you want to schedule a report to hit your inbox daily, weekly, monthly, etc. you can do that here
- You can also set the format you'd like for your report and select reports by category: Opportunity, Volunteer, Training and more

Reporting



My Associations

Daniel Wainiel

Enhanced

Search Report

ENHANCED

Name Categories Sorts Filters Layout

Select fields to include on report

- Opportunity Summary
- Total Active Volunteers
- Total Unverified Hours
- Total Verified Hours
- Total Volunteers Awaiting Approval

Data Field	Summary Function			
Volunteer.Full Name	f: None	↑	↓	×
Volunteer.Joining Date	f: None	↑	↓	×
Volunteer.Email	f: None	↑	↓	×
Volunteer.Team Name	f: None	↑	↓	×
Opportunity Summary.Total Verified Hours	f: None	↑	↓	×

- Summarize By -
One or more sorts must be defined to summarize

Page Header Page Footer Grand Total

+ Add

Custom Report 1

Full Name	Joining Date	Email	Team Name	Total Verified Hours
Full Name 1	Joining Date 1	Email 1	Team Name 1	Total Verified Hours 1
Full Name 1	Joining Date 1	Email 1	Team Name 1	Total Verified Hours 2
Full Name 2	Joining Date 2	Email 2	Team Name 2	Total Verified Hours 3
Full Name 2	Joining Date 2	Email 2	Team Name 2	Total Verified Hours 4

- Enhanced Reports allow you to select your own defined Filters, Sorting and Layout to create a customized report
- Dashboard Reports allow you to visualize data so you can chart, map, and understand how your volunteering evolves over time
- More information on Reporting can be found online and by attending a webinar on how to utilize the reporting functions [Fundly Webinar Events](#)

Fundly Connect → Fundly CRM Sync



My Associations

Daniel Wainiel

Fundly Connect to Fundly CRM Sync Configuration

Enable Sync

Two way Sync

Associated Volunteers information like (Name, Primary Email, Mailing Address, Primary Phone).



Nihir Porechaz

ContactId : 5448433 | Last Modified on 02/12/2016 by Dan Wain

Personal Info

Relationships

Contact Type



Giving Summary

Summary as on Feb 24, 2016 12:00:00 AM

All Sources

\$100.00 First Gift (Feb 12, 2016)	\$350.00 Latest Gift (Feb 13, 2016)
\$450.00 Lifetime Gift	\$225.00 Average Gift
\$350.00 Most Common Gift	0 Recency (Months)
\$350.00 Largest Gift	2 Number of Gifts

Fundly Connect Information

Opportunity	Owner	Organization	Status	Start Date	End Date
Tuesdays with ACS	Dan Wain	VFW	Accepted by Agency	02/11/2016	02/11/2017

Application Date : 02/11/2016 | Verified Hours : 0 | UnVerified Hours : 0

View All Giving Details

- There is a sync from Fundly Connect to Fundly CRM, so anytime you create a new record in Connect, that record gets pushed into CRM
- The record in CRM is automatically labeled as a **Volunteer Contact Type** and their volunteer hours and opportunities are sent to the CRM record in the Fundly Connect Information window
- To setup this integration, navigate to your configurations in Fundly Connect and Toggle on the **Enable Sync** setting
- Now you can report and communicate using volunteering data and giving!

Supporting Material

- All NonProfitEasy and Fundly Connect webinars can be found online
[Fundly Product Webinars](#)
- All Fundly Connect training videos can be found online
[Fundly Connect v2.0 Training](#)
- Tailored 1x1 training can be scheduled for \$100/hour with our training team
- Please email your Volunteer Center for support questions
- Bi Monthly Call In sessions for Free Partner Agencies can be found online
[Bi-Monthly Agency Q/A Sessions](#)
- If you are interested in learning more about donor management (Fundly CRM) or starting a crowdfunding or Peer to Peer fundraising campaign (Fundly Pro) please visit <http://fundlycrm.com> or <http://fundly.com/pro> and contact sales@fundly.com