



# Student Coordinator User Guide: An Introduction to Fundly Connect™

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**Fundly Connect™ Student Coordinator User Guide**  
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## Fundly Connect™ Student Coordinator User Guide

Look for the “👍” symbol for best practices and tips.

As Student Coordinators, you are given the ability to perform administrative tasks on your own portal such as schedule, as well as log and verify hours for students assigned to your designated opportunity and location. You'll have your own database with student, team and opportunity records.

## Receiving Student Coordinator Assignment

Once you are assigned as a coordinator to an opportunity and location, you will receive an email notification of your coordinator information. Just click on the “logon here” link to open the login page.

## Using a Student Coordinator Account

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

### Access your Student Coordinator Account

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

### Navigate your Student Coordinator Account

#### The Coordinator Dashboard

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

In the Dashboard, you will see the following:

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### Volunteers

- When clicked, displays student list where you can access records

### Teams

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

### Opportunities

- When clicked, displays opportunities of the organization you manage

### Verified Hours

- Displays total verified hours of students

### Unverified Hours

- Displays total unverified hours of student

## The Main Menu

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

In the Main Menu, you will see the following:

### Dashboard

- Return to the Dashboard

### Coordinator Calendar

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

### Manage Opportunities

- View the opportunities that you manage for this organization

### Volunteers / Teams

- View the list of students and teams where you can access records

### Quick Assign and Schedule Volunteers (universities only)




- View the opportunities that you manage for this organization

### Mass Schedule Changes (universities only)

- View the list of students and teams where you can access records

## The Quick Menu

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

Icon	Icon Name	Function
	Add	Add hours
	Recent Volunteers	See list of students you have recently viewed
	Recent Visits	See list of recent pages you have visited in Fundly

## Assign Students to an Opportunity

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

### Assign an Individual Student

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

1. From the **Main Menu**, click **Manage Opportunities**.
2. Next to the desired opportunity, click **Assign Volunteer** in the dropdown menu.
3. In the “Choose Volunteer or Team” field, type the name of the desired student or team.

*Note:* While the steps below demonstrate how to add a student to an opportunity, you may also add a team.

- a. If the student exists in the system, their name will appear. Click on the student’s name.
  - b. If the student does not exist in the system, press **Enter** on your keyboard. A window will open allowing you to manually enter the student. If you wish to create a user account for the student, set the slider to **Yes**; the student will receive an account set-up email. Enter the student’s First and Last Names, Email, and Mobile Phone number. Then, click **Save**.
4. Click **Assign Volunteer**. When the process is complete, click **Close**.

### Assign Multiple Students Using Quick Assign and Schedule

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

*Note:* This section applies only to a university’s opportunities.

1. From the **Main Menu**, click **Quick Assign and Schedule**.
2. Select an Opportunity from the “Select Opportunity” dropdown menu.
3. If you have previously set up a configuration for this opportunity that you wish to use, click **Assign Volunteer** in its dropdown menu and skip to step 10.

*Note:* To edit a configuration, click **Edit** in its dropdown menu.

4. Create a Configuration Name.  
*Note:* A configuration allows you to save these settings to use for future quick assigns.
5. Select a Location, Shift, and Position.
6. Select a From Time and To Time.

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


## View all Students of an Opportunity

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

## Remove a Student from an Opportunity


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

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

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

## Schedule a Student

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

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

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

### Create a Schedule

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

### Create Multiple Schedules for a Single Student

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

1. Next to the desired student, click **Add Schedule** in the dropdown menu.
2. Follow steps 2-3 from the “Create a Schedule” tutorial above.

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3. If you are done scheduling for this student, click **Save** and **Close**. If you wish to create another schedule, click **Save & Add New**. Set the new schedule, then click **Save** and **Close**.

## Make Mass Schedule Changes

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

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

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

## Edit or Delete a Schedule

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

## Log or Verify Hours for a Student

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

### Verify Hours Logged by a Student

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

1. From the **Main Menu** click **Manage Opportunities**.
2. Next to the desired opportunity, click **Manage Volunteers**.



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3. For students with unverified hours, there will be an amount listed in the “Unverified Hours” column. To review these hours, click **the number** in the column.
4. To approve a time log entry, click **Approve**. To reject a time log entry, click **Reject** in the dropdown menu, enter a reason, and click **Reject**.

### Log Hours Manually

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

### Log Hours Using the Quick Log Tool

To log hours for an event or a student in bulk, use the “Quick Log Hours” tool.

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

### Log Hours Using the Attendance Tool

To log hours by indicating whether a student attended their scheduled shift, use the “Attendance” tool.

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

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6. Repeat steps 4-5 above for each desired date.

# Communicate with Students

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

## Email Students

1. From the **Main Menu**, click **Volunteers / Teams**. Alternatively, if you manage multiple opportunities and wish to email only students of a single opportunity, from the **Main Menu** click **Manage Opportunities**. Next to the desired opportunity, click **Manage Volunteers** and proceed below.
2. To communicate with an individual student: Click on the email address below the name of the desired student. Proceed to step 4.
3. To communicate with multiple students: To email all of the students listed, select **Send Email to All** from the “Action” dropdown menu and click **Apply**. To only email some of the students listed, check the boxes next to the names of the desired students. Then, select **Send Email** from the “Action” dropdown menu and click **Apply**.
4. On the New Email page, enter CC or BCC email addresses, if desired, and a Subject for the email.
5. To add a document or image to this email, click on **Click here OR Drop file here** under “Attachments.” Select the desired document from your computer.
6. To use an existing template for this email, select it from the “Template” dropdown menu. *Note: Only templates previously saved using the method listed in step 7 below will appear in this dropdown menu.*
7. To save this email as a template for future use, check the box next to “Save As Template.” Then, name the template in the “Template Title” field.
8. Enter the content of your email in the “Body” field. If desired, you can use the formatting options available.
9. If you wish, you can add placeholders to the body of the email. Use placeholders to auto-populate the text with information (e.g., First Name, Total Hours Volunteered) specific to each recipient.
  - a. To add a placeholder to the body of the email, place your cursor at the location in the email content where you want the placeholder to be added.
  - b. Select the desired placeholder from the “Placeholder” dropdown menu, then click the **add icon**.
  - c. Repeat for each additional placeholder.
10. To save your work and send the email later, click **Save As Draft**. To send now, click **Send**.


## View Communication History

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

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

## View and Edit a Student’s Profile

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

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

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