



Faculty User Guide: An Introduction to Fundly Connect™

NONPROFITEASY
6 PETALUMA BLVD. N., STE A7
PETALUMA, CA 94952
PHONE: 707-929-3563 EXT 2

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Fundly Connect™ Faculty User Guide
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Look for the “👍” symbol for best practices and tips.

Getting Started

Create a Fundly Connect™ Account

In order to post opportunities to your university’s public site and then be able to manage volunteers, faculty and staff must first create an account.

Note: Depending on how the university configured their signup process, some of the steps may not be available. The wording in the steps below may also vary slightly for each university.

1. Go to your associated university’s Fundly Connect™ site and click **Faculty/Staff** under the “Register As” tab.
2. Enter your email address and click **Go**.
 - 👍 If you wish to sign up through a preexisting social media account instead, click the desired platform (e.g., Facebook or Google), and enter your login information.
3. Under “Basic Info.,” enter your name and create a username and password, which will become your login for Fundly Connect™.
4. Enter your Title, Primary Home Department, Work Information, Work Phone, and Address Details. Click **Next**.
5. Under “Causes,” select the causes for which you are interested in. Click **Next**.
6. Under “Skills,” check the boxes next to the skills you are interested in utilizing. You may select entire categories (e.g., Arts), or select individual items within a category (e.g., Crafts, Photography, and Dance).
7. Select your current CSL course. Click **Next**.
8. Under “Agreements”, you may be required to sign agreements (e.g., photo release waiver, liability waiver).
9. After completing all steps, click **Register**. You will receive a confirmation email containing the username and password that you set.

Log in to your Fundly Connect™ Account

1. Bookmark your university’s Fundly Connect™ home page.
2. Click on **Faculty/Staff Login** at the top right of the screen.
3. Enter your username and password, then click **Login**.

Navigate Fundly Connect™

The Dashboard

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

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To access the Dashboard from your university's public site, click **Go To Dashboard** at the top right of the screen. Or, if you are already inside the portal, click the **Main Menu**, then click on **Dashboard**.

In the Dashboard, you will see the following:

Active Opportunities

- Number of active opportunities posted by the faculty

Students

- Number of students who signed up for the course in which the faculty is associated

Active Participants

- Number of active students who have participated in the opportunity associated with the course in which faculty is associated

Hours

- Number of hours rendered by your volunteers for your opportunities on Fundly Connect™

Summary of My Opportunities

- Details about your opportunities, participants and hours

University Section

- Details about your associated university(ies)

Community-Engaged Courses Section

- Details about your courses

The Main Menu

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

In the Main Menu, you will see the following:

Dashboard

- Return to the Dashboard

My Opportunity

- View and manage your opportunities

Directories

- Course Directory
- Faculty/Staff Directory
- Organization Directory

My Profile

- Add or update details to your personal profile

Credentials

- Update your username and/or password

Key Guide

The following icons appear throughout Fundly Connect™.

In some cases, the icon image will be a slight variation of the image included in this table.

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

Customize your Account

My Profile

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

1. From the Dashboard, click the **main menu** at the top of the screen. Then, click **My Profile**.
2. From here, you can change or update details already provided, such as:
 - a. Name
 - b. Address
 - c. Causes: Click the **+** icon. Check the boxes next to the items that interest you. Click **Save**.
 - d. Skills: Click **Add New**. Check the boxes next to the items that interest you. Click **Save**.
3. If desired, you can also add additional information, such as:
 - a. Gender

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- b. Birth Date
 - c. Profile Picture
 - d. Additional Email Address: Click **Add New**, then enter the email address.
 - e. Additional Phone Number: Click **Add New**, then enter the phone number.
 - f. Communication Preferences: Elect to receive emails from Fundly Connect™.
Note: To ensure that you receive communication from Fundly Connect™ and the university with whom you are involved, include email as a communication preference.
 - g. Reminder Notification Preference: Elect to receive separate notifications regarding each opportunity in which you are involved (**Receive All Notifications**) or one notification a day regarding all of the opportunities in which you are involved (**Receive Single Notification**).
4. When finished, click **Save and Next**.

Add an Association

Associate with a University

As a faculty, your only association should be the university under which you created your account. By following the [Create a Fundly Connect™ Account](#) tutorial above, you were automatically associated with your university. If this is not the case, you can associate yourself here.

1. From the Dashboard, click **My Associations**. If your university does not appear, continue with the following steps.
2. Click **Add Association**.
3. Search for the name of your university.
4. Once found, click **Save And Associate**. Click **Close**.

Associate with a Program

Once you're associated with a university, you can associate with any of their programs. This process allows you to post opportunities linked to specific programs or events organized or sponsored by the university. While you may have associated with programs when creating the account, you can add program associations here.

1. From the Dashboard, click **My Associations**.
2. Click **the name of the desired university**.
3. Under "Programs," check the boxes next to any programs with which you wish to associate.
Note: Click the **search/view icon** to view a description of the program.
4. If an agreement is required to participate in the program, it will appear below the program's name. Read the agreement, then sign in the field provided.
5. Click **Save**. Before being finalized, the university may need to approve your request.

Create and Manage Opportunities

Faculty/Staff can create basic and advanced opportunities to share with their university's volunteers on Fundly Connect™. After opportunities are created, faculty/staff can manage them by making edits, managing applicants, and assigning volunteers.

- 👍 Be sure to follow the [Approve, Reject, or Remove a Volunteer](#) tutorial in the days and weeks after creating an opportunity. This will allow you to approve or reject volunteers who apply.

Create a Basic Opportunity

Basic Opportunities are simple opportunities for one time and ongoing events that do not include multiple shifts or locations. To add a basic opportunity, begin in the Dashboard then click the **Active Opportunities** count. Alternatively, you can click the **Main Menu** then click **My Opportunity**. On the Volunteer Opportunities page, click **Add Basic Opportunity**.

Basic Information

1. At the top of the screen, keep the slider set to **Active**.
2. Enter the Opportunity Name.
3. If this opportunity will not take place at a physical location, set the **Virtual Opportunity** slider to "Yes."
4. If this opportunity will not take place at the default address listed under "Location(s)," click the **Edit** button. Enter the new address, then click **Save**.
5. Under "Position(s)," the opportunity will default to a single position called "Volunteer." To add more positions, click **Add Position**. Enter the new position name (e.g., cashier) and an estimated hourly value (e.g., \$10), if desired. Click **Save**.
 - 👍 Positions represent the different jobs a volunteer might perform within an opportunity. Use them to help you coordinate your volunteers by designating different tasks to different positions in the same opportunity.
6. Under "Opportunity Details," enter a description of your opportunity. This description will appear on the public site, exactly as entered.
 - 👍 This description should be professional in nature, so be sure to use complete sentences and proper grammar. Try to mirror a job description on a job-posting site by including details about the activities in which volunteers will be involved.
7. Under "Schedule," designate this opportunity as "One Time" (a one day event) or "Ongoing" (a multiple day event or an ongoing opportunity). Then, set the Start Date and End Date, if applicable.
8. Under "Shift," designate the Start Time and End Time that the opportunity is available. Or, if the time frame can be set around a volunteer's availability, activate the **Flexible Time** slider.
9. Click **Save & Next**.

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Requirements

1. Under “Keywords,” enter keywords related to the opportunity to help potential volunteers locate it (e.g., animals, charity walk, environment). To enter a keyword, type the word or phrase, then press the “enter” key on your keyboard.
 - 👍 Enter as many keywords as possible. Keywords help you initiate the vetting process by attracting volunteers that truly match the opportunity.
2. Select the Cause(s), Skill(s), and Activity Type(s) associated with this opportunity.
3. If you wish to allow volunteers to manage their own schedule, activate the **Volunteer can schedule for this opportunity** slider.
4. If you wish to allow volunteers to log their own hours, activate the **Volunteer can log hours for this opportunity** slider.

Note: You must still verify all hours logged by volunteers.
5. If you wish to review a volunteer’s application before they are allowed to volunteer for an opportunity, activate the **Approval required for volunteer application** slider.
 - 👍 If you have a screening process for volunteers, activate the approval option.
6. Under “Who will be benefited by this opportunity,” select the Age Group(s), Population(s), and Gender(s) of those who will be assisted by the volunteers.
7. Under “Appropriate for which type of volunteers,” select all age groups that are appropriate for this opportunity.
8. If volunteers may apply as a Group or Team, activate the **Groups/Teams are allowed to apply...** slider. If you require information about each individual member of a group or team, active the **Team Member(s)' information required...** slider.
9. Next to **Allow Volunteer(s) To Cancel Opportunity Before**, you can restrict a volunteer’s ability to cancel their shift(s) for an opportunity by entering the number of hours of notice needed (i.e., entering “24” allows a volunteer to cancel their shift up to 24 hours before it starts). If left blank, volunteers can cancel a shift any time.
10. Click **Save & Next**.

Publish

1. In the date field, set the date on which you wish to publish this opportunity.
2. To publish the opportunity on Fundly’s general site, click **Publish on Fundly Site**.
3. Under “Publish/Unpublish to University/Organization,” check the box next to the name of your university.
4. If you are associated with any of the university’s Programs, they will appear below its name. If this opportunity is linked to a particular program, check the box next to its name. If no programs appear and you wish to use this feature, follow the [Associate with a Program](#) tutorial.
5. Click **Publish/Unpublish to University/Organization** at the bottom right hand corner of the screen.

Note: In order for your opportunity to be visible to the university’s community of volunteers, you must complete this step.

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Note: The university may need to approve your opportunity before it becomes visible to volunteers.

Create an Advanced Opportunity

Advanced opportunities are more complex than basic opportunities and can include multiple locations, schedules, and volunteer shifts. To add an advanced opportunity, begin in the Dashboard then click the **Active Opportunities** count. Alternatively, you can click the **Main Menu** then click **My Opportunity**. On the Volunteer Opportunities page, click **Add Advanced Opportunity**.

Basic Information

1. Follow steps 1-7 from the “Basic Information” section of the [Create a Basic Opportunity](#) tutorial above.
2. If this opportunity will take place at multiple locations, click **Add Location** under “Location(s).” Enter a unique title and address for the location, then click **Save**.
3. To delete a location, click **Delete** in the dropdown menu.
4. Click **Save & Next**.

Requirements

1. Follow the “Requirements” section of the [Create a Basic Opportunity](#) tutorial above.

Scheduling And Shift

1. In the “Schedule for” dropdown, select the location to which this schedule applies.
2. Select one of the following as the basis of your scheduling:
 - a. **One Time:** One day event
 - b. **Weekly:** On a weekly basis
 - c. **Monthly:** On a monthly basis
 - d. **Ongoing:** Multiple day event or ongoing opportunity
 - e. **Other:** Untraditional schedules occurring on random dates
3. Set a date(s) or date range.
4. If applicable, select the days of the week and/or days of the month when this schedule will occur.
5. Under “Date Exceptions,” enter any dates or date ranges during which this schedule does not apply, then click the **add icon**.
6. To complete this schedule, click **Save**.
7. The “Add/Edit Shift” window will open, allowing you to set a Shift (i.e., start and end time) for this schedule.
 - a. Enter a Shift Name.
 - b. If applicable, select the Shift Day(s) to which this schedule applies.
 - c. Set the Start and End Times. If volunteers can attend the opportunity based on their own availability, leave Start and End Times blank and activate the **Flexible Time** slider.

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- d. If applicable, select the Positions to which this shift applies and set the maximum capacity for each position, if desired.
Note: Once an opportunity reaches its capacity, volunteers will no longer be able to schedule.
- e. If you are done, click **Save**. If you would like to set an additional shift for this schedule, click **Save And Add New** and repeat the above process.
 - 👉 Set a second shift when you would like to offer multiple shifts on the same day, set different shift times for different days of the week, etc.
8. To set an additional schedule, repeat steps 1-7 above.
9. To edit a schedule, click **Edit** next to the desired schedule. Use the tools on the left of the screen to make desired edits, then click **Save**. To delete a schedule, click **Delete** in its dropdown menu, then click **OK**.
10. To edit a shift, click **View Shift** under the desired schedule. Click **Edit**, makes desired changes, then click **Save**. To delete a shift, click **Delete** in its dropdown menu, then click **OK**.
11. When done setting schedules, click **Save**, then click **Next**.

Publish

1. Follow the “Publish” section of the [Create a Basic Opportunity](#) tutorial above.

View Opportunities

1. From the Dashboard, click the **Active Opportunities** count. Alternatively, you can click the **Main Menu** then click **My Opportunity**
2. A list of your active opportunities will appear. To view inactive opportunities, click on **Inactive** at the top of the screen.
3. To view filtered opportunities: Select a filter from the “Filter By” dropdown at the top of the screen. Complete the field, then click **Filter**.

Edit Opportunities

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

5. To inactivate an opportunity: Click **Edit**. Set the slider at the top of the screen to **Inactive**, then click **Save Only**.

Approve, Reject, or Remove a Volunteer

When a volunteer applies for one of your opportunities, you will receive an email notification. Follow your standard screening process to approve, reject, or remove volunteer applicants, depending on how you initially set up your opportunity.

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

Approve or Reject an Applicant

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

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

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

Remove a Volunteer

If you did not select “Approval required for volunteer application” during the opportunity creation process, all applicants are automatically approved unless removed from the opportunity. To remove an applicant from an opportunity, follow the steps below.

1. From the **Main Menu**, click **My Opportunity**.
2. Next to the desired opportunity, click **the number** that appears in the “Volunteers” column.
3. Next to the appropriate volunteer, click **Remove Volunteer**, then click **OK**.

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

View all Volunteers of an Opportunity

1. From the **Main Menu**, click **My Opportunity**.
2. Next to the desired opportunity, select **Manage Volunteers** from the dropdown menu. A list of all of the opportunity’s volunteers will appear.
3. To create an Excel spreadsheet containing the volunteers’ names, contact information, and hours, click **All Search Results** at the bottom right corner of the screen, then click **Export**.
4. Follow your computer’s prompts to open and save the file.

Schedule a Volunteer

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

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

Create a Schedule

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

Edit or Delete a Schedule

1. From the **Main Menu**, click **My Opportunity**.
2. Next to the desired opportunity, click **Manage Volunteers** in the dropdown menu.
3. Next to the desired volunteer, click **View Schedule** in the dropdown menu.
4. To edit a schedule: Click **Edit**. Follow steps 4-6 from the [Create a Schedule](#) tutorial above.
5. To delete a schedule: Click **Delete** in its dropdown menu, then click **OK**.

Create Multiple Schedules for a Single Volunteer

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

1. From the **Main Menu**, click **My Opportunity**.
2. Next to the desired opportunity, click **Manage Volunteers** in the dropdown menu.
3. Next to the desired volunteer, click **Add Schedule** in the dropdown menu.

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4. Follow steps 4-6 from the [Create a Schedule](#) tutorial above to fill in the information for the new schedule.
5. If you are done scheduling for this volunteer, click **Save**. If you wish to create another schedule, click **Save & Add New**. Set the new schedule, then click **Save**.

Log or Verify Hours for a Volunteer

Once a volunteer has been scheduled, they can begin logging their hours. Faculty/Staff must verify hours logged by volunteers. You can also log hours for volunteers either manually, or with the attendance tool.

Verify Hours Logged by a Volunteer

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

1. From the **Main Menu**, click **My Opportunity**.
2. For those opportunities with unverified hours, there will be an amount listed in the “Unverified Hours” column. To review these hours, click **the number** in the column.
3. To approve a time log entry, click **Approve**. To reject a time log entry, click **Reject** in the dropdown menu, enter a reason, and click **Reject**.

Log Hours Manually

1. From the **Main Menu**, click **My Opportunity**.
2. Next to the desired opportunity, click **Manage Volunteers** in the dropdown menu.
3. Next to the desired volunteer, click **Log Hours** in the “Next Step” column.
Note: If the volunteer has not set a schedule for this opportunity, “Scheduling” will appear. To set their schedule, click **Scheduling** and follow steps 4-6 in the [Create a Schedule](#) tutorial.
Note: If the volunteer has not attended all required training sessions, “Pending Attendance” will appear. If you wish to mark the volunteer as having attended these sessions, click and follow steps 4-5 in the [Mark Attendance for a Training Session](#) tutorial.
4. Select the volunteer’s assignment.
5. Next to the desired date(s), enter the number of hours worked and a description of the work.
6. Click **Save & Close**.

Log Hours Using the Attendance Tool

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

1. From the **Main Menu**, click **My Opportunity**.
2. Click the name of the desired opportunity.
3. On the left of the screen, click **Attendance**.

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4. Select the desired date, then click **Get Attendees**.
5. Next to each volunteer who attended their shift on the selected date, click **Check In**. If the volunteer did not attend, click **No Show** in the dropdown menu. Alternatively, to check in *all* of the volunteers listed, click **Check In All**.
Note: If you kept the “Auto Log Hours When Marked As Attended” slider activated when creating the opportunity, hours that are checked in are automatically counted as verified hours.
6. Repeat steps 4-5 above for each desired date.

Communicate with Volunteers

Faculty/Staff can communicate with volunteers directly through their Fundly Connect™ accounts.

Send Basic Communication

Basic communication refers to a simple email containing text and attachments. Use one of the methods below to send basic communication to a single or small number of volunteers.

1. If you know the name(s) or email address(es) of the desired recipient(s):
 - a. Click the **Inbox** icon at the top right of the screen.
 - b. Click **Compose**.
 - c. Next to “To,” select **Volunteer**.
 - d. Type the name of a volunteer in the “To” field and click on their name when it appears, or enter the volunteer’s email address. Continue adding volunteers, pressing **Enter** on your keyboard after each entry.
2. On the New Email page, enter CC or BCC email addresses, if desired, and a Subject for the email.
3. 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.
4. Enter the content of your email in the “Body” field. If desired, you can use the formatting options available.
5. To save your work and send the email later, click **Save As Draft**. To send now, click **Send**.
Note: Saved drafts will appear in your “Communication History,” which can be accessed using the [View Outgoing Communication](#) tutorial.

View Communication History

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

View and Reply to Incoming Communication

1. Click **Inbox** at the top of the screen.

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Note: The number listed next to “Inbox” indicates new or unopened incoming communication.

2. A list of all incoming communication will appear in the “Inbox” tab.
3. To search for specific communication: Enter keywords in the search field and/or enter a date range in the From/To fields, then click **Filter**.
4. To review an email: Click on the email in the pane at the left of the screen. It will appear in the right pane.
5. To reply to an email: Click on the desired email. Then, click **Reply**, compose the email, and click **Send**.

View Outgoing Communication

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

Directories

Directories display in detail the list of courses, faculty/staff and organizations you are associated with. These lists can be filtered by university and by doing a search.

Course Directory

- List of courses and their course number, department, university, faculty and description.

Faculty/Staff Directory

- List of faculty/staff and their course/s, university, email, phone number and department.

Organization Directory

- List of organizations and their type, university, contact, email and address.

Log out of your Fundly Connect™ Account

1. Click on the **account menu** at the top of the screen.
2. Click **Log Out**.