University User Guide:

An Introduction to Fundly Connect™

Fundly Connect™ University 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 connect with students, faculty/staff and organizations on Fundly Connect™, universities must first create an account and purchase a subscription.

1. Go to https://connect.fundly.com.
2. Click **Signup Today**. Then click **University**.
3. This opens up the "Request a Demo" page where you need to enter your organization information so the Fundly Connect™ team can schedule a demo.
4. When ready to register, Fundly Connect™ team will send a link where you can signup.
5. Under "Basic Info.," enter your university's EIN and create a username and password, which will become your login for Fundly Connect™.
6. Enter your University Details, Address Details, and a Primary Contact. Click **Next**.
7. Review the subscription plans. You have the option to purchase a monthly or an annual subscription. Click **Select** next to your desired subscription plan**.**
8. Enter your credit card information and billing address.
9. Enter your desired site URL.
   - ♦ If your university desires more customization, Fundly Connect™ also offers a Vanity URL add-on in the Purchase Add-Ons section. A Vanity URL serves as a powerful marketing tool for a university to promote its brand to students, faculty/staff and organizations.
10. Under "Order Summary," enter any applicable discount codes.
11. Click and read the **Terms & Conditions**, then check the box to accept them.
    Note: To review the Terms & Conditions in the future, login and click on the **account menu** at the top of the screen, then click **Terms & Conditions**.
12. Click **Register**. You will receive a confirmation email that includes your login details.

Log in to your Fundly Connect™ Account

1. Bookmark your university's Fundly Connect™ home page created in step 9 of the Create a Fundly Connect™ Account tutorial (i.e., connect.fundly.com/site/universityname).
   Note: You can also login to your account from the Fundly Connect™ page at https://connect.fundly.com by clicking on **Sign In**.
2. Click on **Organization 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 activities on Fundly Connect™. From here, you can review information related to your students, teams, faculty/staff, opportunities and organizations, as well as access other areas of the site.

To access the Dashboard from your public site, click **Go to Dashboard** at the top right of the page. 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 Students
- Number of active students associated with your university on Fundly Connect™

Active Teams
- Number of active teams associated with your university on Fundly Connect™

Active Organizations
- Number of active organizations associated with your university on Fundly Connect™

Active Opportunities
- Number of active opportunities your university has created on Fundly Connect™

Active Partner Opportunities
- Number of active opportunities your partner organizations have published to your university

Active Faculty
- Number of faculty/staff associated with your university on Fundly Connect™

Organizations Awaiting Approval
- Number of organizations that you must approve before they become associated with your university's Fundly Connect™ account

Opportunities Awaiting Approval
- Number of partner opportunities that you must approve before they become active on your university's Fundly Connect™ account

Students Awaiting Approval
- Number of students that you must approve before they become associated with your university's Fundly Connect™ account

Faculty/Staff Awaiting Approval
- Number of faculty/staff that you must approve before they become associated with your university's Fundly Connect™ account

Current Courses
- Displays details about your current 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 left of the screen.

In the Main Menu, you will see the following:

Icon	Icon Name	Function
	Add New	Add a student, team, opportunity, hours, organization and faculty/staff
	Recent	See list of recent pages you have visited in Fundly Connect™
	Dashboard	Return to the Dashboard
	Communications	Communicate with students/faculty/staff or organizations, view communication history, and create or manage communication templates
	Faculty/Staff	View, add and edit faculty/staff records
	Import Utility	Import schools, departments, courses and faculty by batches
	Opportunities	View your own and your partner opportunities, design application forms, setup orientations & trainings
	Organizations	View, add and edit associated organizations
	Reports	Create reports from the information in your account
	System Configurations	Personalize your account by setting preferences
	Students	Add, search for, assign, and schedule students; create or assign student coordinators
	Website Integration	Configure your university's public Fundly Connect™ site

Key Guide

The following icons appear throughout Fundly Connect™.

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

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/Close	Removes or closes a page or item
	Add/Open	Adds or opens a page or item
	Return	Returns user to previous page
	Information	Provides a description
	Search/View	Conduct a search / View details

Customize your Account

Account Settings

For all account settings, begin in the Dashboard and click the **account menu** at the top-right of the screen. Then, click **My Account**.

Organization Information

1. Click **Organization Info** on the left of the screen.
2. Edit and add any desired information regarding your university.
3. When done, click **Save**.

Change your Subscription

A university can choose from several subscriptions that each allow a different number of admins, or number of users who can be simultaneously logged in. Increasing or decreasing this number will change your monthly or annual rate.

1. Click **My Account** on the left of the screen.
2. To upgrade your account or change your subscription, click **Change** in the "Current Plan" box.
3. If prompted, add your credit card information and billing address, then click **Update**.
4. Review the subscription plans. Prices differ based on whether you subscribe for plans on a monthly or yearly basis.
5. Click **Monthly** or **Yearly** next to the desired plan to subscribe.

Purchase Add-Ons

Universities have the option to purchase add-ons that offer extra functionality in Fundly Connect™.

1. Click **My Account** on the left of the screen.
2. To add an Add-On to your account, click **Activate** next to the desired feature.
3. If applicable, choose whether you wish to subscribe on a monthly or yearly basis. Click **Purchase**, then click **OK**.
4. To remove an Add-On from your account, click **Deactivate** next to the desired feature.

Edit Credit Card Information

1. Click **My Account** on the left of the screen.
2. Click **Edit** at the top of the screen.
3. Edit your credit card information and/or billing address. Click **Save**.

Generate Account Statement

An account statement provides a summary of your university's Fundly Connect™ purchases, payments, and credit balance (i.e., refunds) during a designated date range.

👍 Account statements are a useful record when tracking your university's expenses, submitting grant proposals, etc.

1. Click **My Account** on the left of the screen.
2. Click **Generate Statement** at the bottom right corner of the screen.
3. Select the desired Start and End Dates for the statement.
4. Click **Generate**.
5. Follow your computer's prompts to open and save the statement file.

Change Username or Password

1. Click **Credentials** on the left of the screen.
2. To change username: Enter your new username. Click **Save**.
3. To change password: Enter your old password, new password, and confirm your new password. Click **Save**.

Manage User List

A user refers to each individual login and password in a university's account.

Note: To upgrade your account to allow for additional admins, use the Change your Subscription tutorial above.

1. Click **Users** on the left of the screen.
2. To edit a user: Click **Edit** next to the desired user. Make desired edits, then click **Save**.
3. To add a user: Click **Add User** at the bottom right corner of the screen. Enter the new user's information, then click **Save**. A password will be sent to the email address provided.
4. To delete a user: Click **Delete** in the user's dropdown menu.
5. To reset a user's password: Click **Reset Password** in the user's dropdown menu. A new password will be sent to the user's email address.

Manage Application Roles

When a user is created, it is assigned a role. To restrict users from having access to certain functions or information, a university can create and define application roles.

1. Click **Application Roles** on the left of the screen.
2. To add a new application role, click **Add New Role** at the bottom right corner of the screen.
3. Enter a name and description for the new role in the Role and Description fields.
4. For each option listed under the "Accounts" tab, select **Allow** to allow this role access, or **Deny** to deny access.

    👍 It is recommended that only one user have access to "Account Information" (change organization information, subscription, and credit card information), "User Management" (create and edit users), and "Role Management" (create and define application roles).

5. Click the **Fundly Connect tab** (next to the "Accounts" tab). For each option, select **Allow** to allow this role access, or **Deny** to deny access.
6. When done, click **Save**.
7. To edit an application role created by your university, click **Edit**.

My Profile

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

University Profile

1. From the Dashboard, click the **account menu** at the top of the screen. Then, click **My Profile**.
2. In the **University Profile** tab, add or make any desired edits to your university's name, EIN, website, or address.
3. Edit your university's email address, if desired. To add an additional email address, click **Add New.**
4. Add or edit your university's phone number, if desired. To add an additional phone number, click **Add New**.

5. Add or edit a mission statement, if desired.
6. Edit your university's primary contact, if desired.
7. Edit your university's causes, if desired.
8. When done, click **Save**.

User Profile

1. From the Dashboard, click the **account menu** at the top of the screen. Then, click **My Profile**.
2. Click the **User Profile** tab.
3. Make any desired edits to the user's name or email address.
4. To add an Email Signature, enter the signature in the text box. If desired, you can use the formatting options available.
5. When done, click **Save**.

Configurations/Settings

To customize your university's Fundly Connect™ account, you may set and add additional preferences with Configurations/Settings. If your university involves activity types, age groups, causes, populations, or skills that are not included in the options provided by Fundly Connect™, you can add them here and they will appear as options when creating an opportunity. Preferences for topics such as agreements, custom datasets, programs, sponsors, notifications, and social sharing are also set under configurations.

OPPORTUNITIES

Activity Types

"Activity Types" refer to the activities that the university and its students take part in to support its cause.

1. From the **Main Menu**, click **Opportunities**.
2. Click **Activity Types**.
3. To add an activity type: Type its name into the "Name" field, then click **Add**.
4. To edit the name of an activity type: Click **Edit**, type the new name, then click **Save**.
   Note: Only activity types that have been added by the user can be edited or deleted.
5. To delete an activity type: Click **Delete** in its dropdown menu, then click **OK**.

Age Groups Required

"Age Groups Required" refers to the desired age of students working with the university.

1. From the **Main Menu**, click **Opportunities**.
2. Click **Age Groups Required**.
3. To add a new age group: Type its name in the "Name" field, then enter a Start Age and End Age. Click **Add**.
4. To edit an age group: Click **Edit**. Make the desired changes, then click **Save**.
   Note: Only age groups that have been added by the user can be edited or deleted.
5. To delete an age group: Click **Delete** in its dropdown menu, then click **OK**.

Age Groups Served

"Age Groups Served" refers to the age of the individuals whom the university serves.

1. From the **Main Menu**, click **Opportunities.**
2. Click **Age Groups Served**.
3. To add a new age group: Type its name in the "Name" field, then enter a Start Age and End Age. Click **Add**.
4. To edit an age group: Click **Edit**. Make the desired changes, then click **Save**.
   Note: Only age groups that have been added by the user can be edited or deleted.
5. To delete an age group: Click **Delete** in its dropdown menu, then click **OK**.

Causes

"Causes" refer to the causes that define the mission of a university.

1. From the **Main Menu**, click **Opportunities**.
2. Click **Causes**.
3. To add a cause: Type its name in the "Name" field, then click **Add**.
4. To edit the name of a cause: Click **Edit**, type the new name, then click **Save.**
   Note: Only causes that have been added by the user can be edited or deleted.
5. To delete a cause: Click **Delete** in its dropdown menu, then click **OK**.

Populations Served

"Populations Served" refers to categories that classify the population that the university serves.

1. From the **Main Menu**, click **Opportunities.**
2. Click **Populations Served**.
3. To add a new population: Type its name in the "Name" field, then click **Add**.
4. To edit a population's name: Click **Edit**. Make the desired change, then click **Save**.
   Note: Only populations that have been added by the user can be edited or deleted.
5. To delete a population: Click **Delete** in its dropdown menu, then click **OK**.

Preferred Locations

A university can save preferred locations. These are locations that you usually use when creating opportunities. This will allow you to select from any of the configured preferred locations so you won't have to manually enter them every time.

1. From the **Main Menu**, click **Opportunities**.
2. Click **Preferred Locations**.
3. To add a preferred location: Click on **Add Location**. Enter a Title and the exact address, then click **Save**.
4. To edit a preferred location: Click **Edit**. Make the desired change, then click **Save**.
5. To delete a preferred location: Click **Delete** in its dropdown menu, then click **OK**.

Opportunity Types

"Opportunity Types" refer to categories that classify the opportunities that the university publishes.

1. From the **Main Menu**, click **Opportunities.**
2. Click **Opportunity Types**.
3. To add a new opportunity type: Type its name in the "Name" field, then click **Add**.
4. To edit an opportunity type name: Click **Edit**. Make the desired change, then click **Save**.
   Note: Only opportunity types that have been added by the user can be edited or deleted.
5. To delete an opportunity type: Click **Delete** in its dropdown menu, then click **OK**.

Social Sharing

Your university and its students have the option to share content on personal social media accounts when an opportunity is published or applied for. You can customize the default message that appears when this content is shared, but note that universities and students have the ability to further edit these messages at the time of posting. Content will only be shared if universities or students choose to do so.

1. From the **Main Menu**, click **Opportunities**.
2. Click **Social Sharing**.
3. In the "Message when publishing opportunity field," add the message you would like to appear when your university shares that it published an opportunity on Fundly Connect™. When done, click **Save**.
4. In the "Message when student applies to an opportunity" field, add the message you would like to appear when students share that they applied to an opportunity on Fundly Connect™. When done, click **Save**.

Partner/Faculty Opportunity Review

As the university, you have the option to review and approve opportunities created by your faculty/staff and partner organizations before they are posted on your university's public site.

1. From the **Main Menu**, click **Opportunities**.
2. Click **Opportunity** under **Settings**.
3. To enable this feature, activate the **Review Required** slider.

Notification Settings

To remind students and opportunity owners of an upcoming opportunity for which they are scheduled or hosting, your university can set up to three reminder notifications. You can also set up automated thank you letters.

Note: Notification settings only apply to your university's own opportunities and students, not to those of your partner opportunities.

1. From the **Main Menu**, click **Opportunities**.
2. Click **Notification Settings** under **Settings**.
3. Under "Notification Settings," you can customize notifications designed to remind students and opportunity owners of upcoming opportunities.
   a. To set when a reminder notification is sent, enter a number in the "Days Before Scheduled Date" box. If you enter a "7", for example, a notification will be sent 7 days before the date of the opportunity.

      b.   To set who will receive notifications, select **Student** and/or **Opportunity Owner**.

      c.   To disable a reminder notification, check **NA**.

      d.   To set a second reminder notification, repeat the steps above in the additional "Days Before Scheduled Date" box provided.

      e.   To set a reminder notification to be sent on the day an opportunity occurs, complete the "On Scheduled Date" box.

4. Under "Automated Thank You Letter Settings," you can set up automated thank you letters.

      a.   To set when a thank you letter is sent, enter a number in the "Days After Scheduled Date" box.

      b.   Check the **Student** box.

      c.   To disable thank you letter notifications, check **NA**.

5. To disable all notifications, set the slider at the top of the screen to **Disable**.

6. When done, click **Save**.

From this page, you can also edit the written content of the notifications sent to students. Changes made during this process will apply to all notifications.

1. To edit the content of the opportunity reminder notification, click the **Volunteering Day Email** link at the top of the screen. A new webpage will open.

2. If desired, edit the Sender Email, Sender Name, and Subject fields.
   Note: The Sender Email should be one that is associated with your university. This will enable you to receive all replies.

3. To inactivate all reminder notifications, uncheck the **Active** box.

4. To add an email address as a recipient of this notification each time it is sent, check the **Additional Info** box. Enter a Receiver Email and/or CC Address associated with your university.
   Note: This feature is not recommended due to the volume of reminder notifications sent.

5. To edit the content of the message, make any desired changes in the "Contents" box. If desired, you can use the formatting options available.
   Note: Editing text that appears between placeholder brackets "{ }" may invalidate the placeholder.

6. If you wish, you can add placeholders to the body of the notification. Use placeholders to auto-populate the text with information (e.g., Opportunity Name, Scheduled Date) specific to each recipient or opportunity.

      a.   To add a placeholder to the body of the notification, place your cursor at the location in the contents box 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.

7. When done, click **Save**.

8. To edit the content of the thank you letter notification, click the **Automated Thank You Email** link at the top of the screen. A new webpage will open. Follow the same steps as above.

ORGANIZATIONS

Organization Types

When an organization creates an account or edits its profile, it can select what type of organization it identifies as. You can add custom organization types below.

1. From the **Main Menu**, click **Organizations**.
2. Click **Organization Types**.
3. To add an organization type: Type its name in the "Name" field, then click **Add**.
4. To edit an organization type: Click **Edit**. Make the desired change, then click **Save**.
   Note: Only organization types that have been added by the user can be edited or deleted.
5. To delete an organization type: Click **Delete** in its dropdown menu, then click **OK**.

SYSTEM CONFIGURATIONS

Agreements

Universities have the option to require students, faculty/staff and organizations to sign an agreement (e.g., photo release waiver, liability waiver) upon registering or applying for an opportunity or program.

Note: In the Create a Program tutorial, you can add agreements to individual programs.

1. From the **Main Menu**, click **System Configurations**.
2. Click **Agreements**.
3. To create an agreement, at the bottom right corner of tthe screen click **Add New Agreement**.
4. To inactivate this agreement, set the slider at the top of the screen to **Inactive**.
5. Enter an Agreement Title.
6. If the agreement is for organizations, activate the **Applies to Organization Registration** slider.
7. If the agreement is for students, activate the **Applies to Student Registration** slider.
8. If the agreement is for faculty/staff, activate the **Applies to Faculty/Staff Registration** slider.
9. To add a document containing the agreement:
   a. Select the **Upload Agreement** button.
   b. Click on **Click here OR Drop file here**.
   c. Select the desired document from your computer.
10. To manually enter the agreement content:
    a. Select the **Agreement Content** button.
    b. Enter the content of the agreement. If desired, you can use the formatting options available.
11. When done, click **Save**.
12. To edit an agreement: Access your agreements and click **Edit** next to the desired agreement. Follow steps 4-10 above to make edits.
13. To delete an agreement: Access your agreements and click **Delete** in the dropdown menu of the desired agreement.

Courses

"Courses" are normally individual subjects and are led by one or more instructors. A department must be selected when configuring courses.

1. From the **Main Menu**, click **System Configurations.**
2. Click **Courses**.
3. To add a new course: Click **Add New Course**. Enter the course name, number, date range and description, then select the department, faculty and any associated organization. Click **Save**.
4. To edit a course: Click **Edit**. Make the desired change, then click **Save**.
5. To delete a course: Click **Delete** in its dropdown menu, then click **OK**.

Custom Datasets

Custom datasets allow universities to obtain additional information from students, and/or organizations through the creation of customized fields. While Fundly Connect™ provides basic prefabricated fields such as name, address, and gender, this feature allows your university to add custom datasets requesting unique information. These fields will appear during the sign-up process when a student or organization creates an account with your university or on an application form when a student applies to an opportunity.

👍 If your university requires students to fill out an application form, you can use the custom dataset feature to digitally reproduce the form on Fundly Connect™.
1. From the **Main Menu**, click **System Configurations.**
2. Click **Custom Datasets**.
3. At the bottom right corner of the screen, click **Add New Dataset**.
4. Enter a Data Set Name and a Description, if desired.
5. If the dataset is specific to a program offered by your university, select the desired program(s).
   Note: If you select a program, this dataset will appear to any organization that wants to link to that program under your university.
6. If the dataset is applicable to students or organizations signing up with your university, select **Student** or **Organization**.
   Note: If you select one of these options, this dataset will automatically appear when a student or organization signs up for an account under your university.
7. If the dataset is applicable to students applying to an opportunity, select **Opportunity**.
   Note: This dataset will not automatically appear when a student applies for an opportunity, but will be available when designing application forms for opportunities.
8. Click **Save**. Additional fields will appear.
9. To add a new field to this dataset, enter a Field name.
10. Select a Field Type. The descriptions below explain what each field type allows the user to do.
    a. **Text**: Provide short text answers (one line)
    b. **Multiline Text**: Provide long text answers (multiple lines)
    c. **Number**: Enter numbers only
    d. **Yes or No**: Select from "Yes" and "No" radio buttons
    e. **Phone**: Enter phone number

    f. **Email**: Enter email address

    g. **Url**: Enter url

    h. **Date**: Select date from a calendar

    i. **Date & Time**: Select date and time from a calendar

    j. **Dropdown (single choice)**: Select one of multiple choices in a dropdown format

    k. **Radio Button (single choice)**: Select one of multiple choices in a radio button format

    l. **Checkbox (multiple choice)**: Select multiple choices by checking boxes

    m. **Picture**: Upload a picture from computer

    n. **Document**: Upload a document from computer

11. The Dropdown, Radio Button, and Checkbox field types require that you provide additional options for the user to choose from. To add an option, enter your text in the Options field and click the **add icon**. Click the **add icon** to add another option. Click the **remove icon** to remove an option.

12. Select whether the field is **Required** and/or for **Staff Use Only**, if applicable.
Note: Any fields marked as "Staff Use Only" will not be visible to students or organizations.

13. Click **Save Field**.

14. To edit a field you added, click **Edit** next to the desired field.
Note: You may only edit the field name and Required/Staff Use Only options.

15. Continue adding fields until your dataset is complete.

16. Click the up and down arrows to the left of each field name to arrange the order of the fields.

17. When done, click **Save**.

18. To edit a custom dataset: Access your custom datasets and click **Edit** next to the desired dataset. Follow steps 4-17 above to make edits.

19. To delete a custom dataset: Access your custom datasets and click **Delete** in the dropdown menu of the desired dataset, then click **OK**.

1. When done, click **Save**.

Departments

"Departments" are divisions of a school devoted to a particular academic discipline.

1. From the **Main Menu**, click **System Configurations.**

2. Click **Departments**.

3. To add a new department: Type its name in the "Name" field and you may select the school it belongs to. Click **Add**.

4. To edit a department: Click **Edit**. Make the desired change, then click **Save**.

5. To delete a department: Click **Delete** in its dropdown menu, then click **OK**.

Email Notifications

Fundly Connect™ sends automated email notifications when certain actions occur in association with your account. Some notifications are sent to students, faculty/staff or organizations, and some notifications are sent to your own university. You can edit and inactivate these notifications.

1. From the **Main Menu**, click **System Configurations.**

2. Click **Notifications**.

3. The "Title" column lists the type of email notification (i.e., the event that prompts an email notification). To edit an email notification, click the **Edit** button.
4. If desired, edit the Sender Email, Sender Name, and Subject fields.
   Note: The Sender Email defaults to the email address associated with your university or current user's account. Editing the Sender Email address will affect where you receive any replies.
5. To inactivate this email notification, uncheck the **Active** box.
   Note: Do not inactivate email notifications that contain critical information that cannot be accessed elsewhere (e.g., changed password).
6. To add an email address as a recipient of this notification each time it is sent, check the **Additional Info** box. Enter a Receiver Email and/or CC Address associated with your university. If entering multiple email addresses, separate them with a comma and a space.

   👍 For notifications sent to your own university, use this feature when you wish to receive the notification at an additional email address. For notifications sent to students or organizations, use this feature when you wish to track certain processes (e.g., changed passwords).
7. To edit the content of the email notification message, make any desired changes in the "Contents" box. If desired, you can use the formatting options available.
   Note: Editing text that appears between placeholder brackets "{ }" may invalidate the placeholder.
8. If you wish, you can add placeholders to the body of the notification. Use placeholders to auto-populate the text with information (e.g., Opportunity Name, Scheduled Date) specific to each recipient or opportunity.
   a. To add a placeholder to the body of the notification, place your cursor at the location in the contents box 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.
9. When done, click **Save**.
10. To undo changes made to a notification, return to the list of email notifications and click **Restore Default** in the desired dropdown menu, then click **OK**.

Programs

See the "Create a Program" section of the Create and Manage Programs tutorial.

Program Level Security

See the "Program Level Security" section of the Create and Manage Programs tutorial.

Schools

"Schools", also referred to as "Colleges", are divisions within the university comprising one subject area or a number of related subject areas. A school category can be specified when configuring Departments.

1. From the **Main Menu**, click **System Configurations.**
2. Click **Schools**.

3. To add a new school: Type its name in the "Name" field, then click **Add**.
4. To edit a school's name: Click **Edit**. Make the desired change, then click **Save**.
5. To delete a school: Click **Delete** in its dropdown menu, then click **OK**.

VOLUNTEERS

Skills

"Skills" refer to the skills that the university and its students utilize to conduct its activities and support its cause.

1. From the **Main Menu**, click **Students**.
2. Click **Skills**. A list of "parent" and "child" (i.e., sub-) skills will appear.
   Note: Only skills that have been added by the user can be edited or deleted.

3. To add a skill:
   a. To add a parent skill: Click **Add New Skill** in the bottom right corner of the screen. Type the new skill name in the "Parent Skill" field, then click **Save**.
   b. To add a child skill to this parent category: Type the child skill name in the "Skill" field under "Child Skill," then click **Add**.
4. To edit a skill, click **Edit** and the Add/Edit window will open.
   a. To edit the parent skill's name: Type the new name, then click **Save**.
   b. To edit a child skill's name in this parent category: Click **Edit**. Type the new name, then click **Save**.
5. To delete a skill:
   a. To delete an entire parent category: Click **Delete** in the dropdown menu, then click **OK**.
   b. To delete a child skill: Click **Edit** next to the parent category. Next to the child skill you wish to delete, click **Delete** in its dropdown menu, then click **OK**.

Tags

A tag is a flag that can be assigned to individual students. This flag can then be used to quickly identify a specific group of students when conducting a search or creating a report. Tags are created here in your configurations and can be assigned to students by following the Assign Tags to Students tutorial.

1. From the **Main Menu**, click **Students**.
2. Click **Tags**.
3. To add a tag: Type its name in the "Name" field, then click **Add**.

   👍 A university that does not have a CRM account may use a "Staff" tag, for example.
4. To edit a tag: Click **Edit**. Make the desired change, then click **Save**.
5. To delete a tag: Click **Delete** in its dropdown menu, then click **OK**.

Time Off

When you or your students schedule a time off, you'll have to select the type of time off you're scheduling. You can add custom time off types below.

1. From the **Main Menu**, click **Students**.

2. Click **Time Off**.
3. To add a time off type: Type its name (e.g., "On Hold") in the "Name" field, then click **Add**.
4. To edit a time off type: Click **Edit**. Make the desired change, then click **Save**.
5. To delete a time off type: Click **Delete** in its dropdown menu, then click **OK.**

WEBSITE INTEGRATION

Featured Opportunities

You can select individual opportunities or specific types of opportunities to feature on your public site. To configure your site to either display or hide featured opportunities, follow the Edit Public Site Content section of the Manage your Public Site tutorial.

Note: If you do not designate any featured opportunities, they will be randomly selected and listed alphabetically.

1. From the **Main Menu**, click **Website Integration**.
2. Click **Featured Opportunities**.
3. To set featured opportunities by their search criteria (i.e., opportunity details): Set the slider to **Search Criteria**.
   Note: If you wish to select specific opportunities to feature instead, skip to step 4.

   👍 You can use this feature to highlight opportunities that are especially current or significant, such as those reflecting upcoming holidays and commemorations or those linked to an upcoming program or event.
   a. Under "What Would You Like To Do?," select the Cause(s), Skill(s), and Activity Type(s) you wish to feature.
   b. Under "Appropriate For," select the Age range(s) you wish to feature. To feature opportunities that allow Team/Group Applications, check the box.
   c. Under "Who Would You Like To Serve?," select the Age range(s), Gender, and Population(s) Served you wish to feature.
   d. If you wish to delete your work and reset all fields, click **Clear Search Criteria**.
   e. When done, click **Save**.
4. To select featured opportunities manually: Set the slider to **Selection**.
   Note: You must set the slider to display featured opportunities by either "Search Criteria" or "Selection." You may not display both.
   a. Click **Select Opportunities**.
   b. In the "Select Featured Opportunities" window, check the boxes next to the opportunities you wish to feature.
   c. When done, click **Select & Close**.
   d. To delete an opportunity from the featured list, click **Delete**.
   e. When done, click **Save**.

Opportunity Search Widget

Opportunity search widgets allow you to display student opportunities on external websites, helping your university and partner organizations promote your opportunities. With your Fundly Connect™

account, you can create multiple widgets, each customized to display different opportunities. Fundly will then automatically generate the script needed to embed the widget into an external website.

1. From the **Main Menu**, click **Website Integration**.
2. Click **Opportunity Search Widget.**
3. To create a new widget, click **Add New Widget** at the bottom right corner of the screen.
4. Enter a Widget Title.
5. To add a Widget Logo, click on **Click here OR Drop file here** and select the desired document from your computer.
6. Click on the **Build Criteria** tab.
   Note: Criteria selections made here will restrict the opportunities that appear in the widget. If you wish to display all opportunities in the widget, do not add any criteria.

   a. Select the Organization(s) and Program(s) whose opportunities you wish to appear in the widget.

      👍 Most partner organizations are unable to create opportunity search widgets in their accounts. To help a partner organization promote its opportunities, create a widget featuring only the organization's opportunities and provide them with the script to use on their website.

      👍 To promote a program, create a widget featuring the program's opportunities and display it on the program's or sponsors' websites.

   b. Under "What Would You Like To Do?," select the Cause(s), Skill(s), and Activity Type(s) you wish to include.

   c. Under "Appropriate For," select the Age range(s) you wish to include. To include opportunities that allow Team/Group Applications, check the box.

   d. Under "Who Would You Like To Serve?," select the Age range(s), Gender, and Population(s) Served you wish to include.

   e. When done, click **Save Build Criteria**. A preview of the widget will appear on the right side of the screen.

7. Click on the **Appearance** tab.
   a. Select the desired Font Color, Button Color, and Border Color.
   b. Enter a width and height for the widget.
   c. When done, click **Save Build Criteria**.

8. To generate the script for this widget, click **Generate Script**. You can then copy and paste the script into the HTML of your website.

9. If you wish to delete your work and reset all fields, click **Clear Build Criteria**.
   Note: Be sure to save your changes.

10. Click **Back** to return to the main opportunity search widget screen.
11. To edit a widget: Click **Edit** next to the desired widget.
12. To generate the script for a widget: Click **Generate Script** in its dropdown menu.
13. To delete a widget: Click **Delete** in its dropdown menu, then click **OK**.

Sponsors

Fundly Connect™ allows universities to add sponsors (i.e., individuals or organizations that donate funds to help run projects, programs, or events) to their accounts. This feature is helpful for tracking and organizing sponsors internally. You also have the option to recognize sponsors by displaying them on your public site.

Note: In the Create a Program tutorial, you can link sponsors to programs to which they are connected.

1. From the **Main Menu**, click **Website Integration.**
2. Click **Sponsors**.
3. To add a sponsor, click **Add New Sponsor** at the bottom right corner of the screen.
4. Enter a Name for the sponsor.
5. Enter the sponsor's Website.
6. Select a Category for the sponsor (e.g., event sponsor, program sponsor, corporation, government agency). Categories will vary according to a university's preferences and needs.
   Note: To create a new Category, type its name and press **Enter** on your keyboard.
7. Select a Level for the sponsor (e.g., Bronze, Gold, $50, $1000+).
   Note: To create a new Level, type its name and press **Enter** on your keyboard.
8. If you wish to display this sponsor on your public site, activate the **Display on public site** slider.

   ☝ Displaying a sponsor on your public site is a great way to recognize their contribution. Sponsor logos appear at the bottom of your public site. If you choose to display a sponsor, be sure to add their website URL (step 5); this allows users to access the sponsor's website by clicking on its logo (step 9).

9. To add an image of the sponsor's Logo, click on **Click here OR Drop file here**. Select the desired document from your computer.
10. If you are done, click **Save**. If you would like to add another sponsor, click **Save And Add New** and repeat the above process.
11. When done, you may click **Back** to return to the main sponsor's page.
12. To edit a sponsor: Click **Edit**. Make the desired edits, then click **Save**.
13. To delete a sponsor: Click **Delete** in the dropdown menu, then click **OK**.
    Note: If a sponsor is currently inactive but may become active again in the future, consider removing them from your public site (step 8) instead of deleting them.

Widgets

This feature allows you to display widgets on your public site. An example would be a Donation Widget used to solicit donations. To create and display a donation widget, your university must also have a CRM subscription with Fundly Connect™.

♦ A Fundly CRM™ account includes many of the same features and perks of a Fundly Connect™ account, but with additional tools to manage pledges, grants, donors, members, and events, it will help your university reach more donors, raise more funds, sell more memberships, and track more interactions and tasks.

1. From the **Main Menu**, click **Website Integration**.
2. Click **Widgets**.
3. To create a new widget, click **Add New Widget** at the bottom right corner of the screen.
4. Enter a Title.
5. Select the desired Page(s) from your public site on which you wish to display the widget.
6. Enter the Script for the widget from your CRM account.
7. When done, click **Save**.
8. To edit a widget: Click **Edit n**ext to the desired widget.
9. To delete a widget: Click **Delete** in its dropdown menu, then click **OK**.

Student Signup

Universities are able to customize the information a student is able or required to provide when signing up.

1. From the **Main Menu**, click **Website Integration.**
2. Click **Student Signup** under **Settings**.
3. Next to each item, choose whether to activate or inactivate the slider.
   Note: Items with "Make...required [on signup]" require the student to provide the indicated information, whereas items with "Display..." give the student the option to provide the indicated information by providing a field for it.
4. If desired, enter a Signup Message to be displayed to the student.
5. When done, click **Save**.

Team Signup

Universities are able to customize the information a team is able or required to provide when signing up.

1. From the **Main Menu**, click **Website Integration.**
2. Click **Team Signup** under **Settings**.
3. Next to each item, choose whether to activate or inactivate the slider.
4. If desired, enter a Signup Message to be displayed to the team.

Organization Signup

Universities are able to customize the information an organization is able or required to provide when signing up.

1. From the **Main Menu**, click **Website Integration.**
2. Click **Organization Signup** under **Settings**.
3. Next to each item, choose whether to activate or inactivate the slider.
4. If desired, enter a Signup Message to be displayed to the organization.

Manage your Public Site

As a university, you are able to design and customize a public site in Fundly Connect™ to represent your university. Your public site is where students, faculty/staff and organizations will initially create an account with your university and where they can return to perform tasks such as searching for

opportunities, viewing opportunity calendars, making donations, and accessing your university's social media accounts.

👍 While Fundly Connect™ provides a template for your public site that includes suggestions for pages and content, it does not contain any information specific to your university. Be sure to populate the site with your university's own content.

Preview Public Site

To preview how your public site appears to visitors, follow the steps below.

1. Open your bookmarked Fundly Connect™ home page created in step 9 of the Create a Fundly Connect™ Account tutorial (i.e., connect.fundly.com/site/universityname).
   Note: Make sure you are logged out as admin or are using a different browser.
2. A preview of your university's public site as it has been configured will appear. You may navigate to and preview other areas of the site by clicking on menu items.

Edit Public Site Appearance

To edit the appearance (i.e., color scheme, layout) of your public site, follow the steps below.

1. From the **Main Menu**, click **Website Integration.**
2. Click **Design My Public Site**.
3. Click the arrow next to "Edit Template" on the right side of the screen. This will expand the templates and configurations panel.
4. In the "Templates" tab, select your desired template.
5. In the "Configure" tab, select your desired colors for the template and background.
6. If desired, you may connect to your Google Analytics account by entering the HTML code from Google in the "Google Analytics Script" content box.
7. When done, click **Save Changes** and collapse the panel by clicking the arrow.
   Note: If you wish to preview the changes you made, click **Preview**.

Edit Public Site Content

To edit the content (i.e., text, images, pages) that appears on your public site, follow the steps below. To begin, go to the **Main Menu**, **Website Integration** and click **Design My Public Site**. Then, click **Edit Template** on the right side of the screen.

Note: If at any time you wish to preview the site, save your work and click **Preview**.

Public Site Widgets

Each public site on Fundly is preconfigured to display certain elements, or "widgets." These widgets appear within dotted lines and can be edited. To edit a widget, click its **edit icon** or click within the dotted lines. Widget types are explained below.

1. **Logo**: Upload an image of your logo and a URL to which the image redirects users

2. **Need Help Text**: Provide information on whom students and users should contact if they experience any problems

   👍 It is recommended that you provide at least your university's phone number and/or email address.

3. **Menu(s)**: Add or edit the items that appear in a menu (i.e., navigation bar); Refer to the Public Site Menu Items section below for more detail

4. **Image Slider**: Upload images to display in a slider on Home page

5. **Summary**: Select which summary items (e.g., Number of Students) you wish to display

6. **Home Content**: Add content (e.g., text, images) to appear on Home page

7. **Hide/Show Featured Opportunities**: Hide or show your Featured Opportunities

8. **Social Media Settings**: Add URLs for your social media sites

Public Site Menu Items

Public sites contain two *menus* (i.e., navigation bars) which consist of *menu items*. Menu items are each created from a different *menu type* (explained in step 3 below). When clicked, a menu item brings the user to another page on your public site or to a designated external link. Menus can be edited and customized.

1. To edit a menu, click its **edit icon**. A list of its current menu items will appear.
   Note: Some menus are not visible from the home page. To access these menus for editing, click on **Preview**. Click on the desired tab (e.g., Register As & Directory) to open its respective menu, then return to the **Edit Template** screen.

2. To create a new menu item, click **Add New Menu Item**.

3. Select a "*Menu Type*" from the dropdown menu. Menu types are explained below. For most menu types, you must enter a "Name" (i.e., the text appearing in the menu) and a "Title" (i.e., the text appearing as the page title). Some menu types require additional steps, as explained below.
   Note: By default, many menu types are already built-in to the menus on the public site template. While you may add multiple menu items of the same type, multiples of some menu types (e.g., Organization Signup, Student Signup, Calendar) will link directly to the content of the original menu item.

   Text Page: Page containing only text, images, and videos (i.e., an "About Us" page)
      a. Enter the desired text in the "Content" box.
      b. Use the formatting options to add additional content (i.e., add images, embed YouTube videos, create tables)
      c. When done, click **Save**.

   Student/Faculty/Staff/Organization Signup: Links to student, faculty/staff, or organization signup and registration page
      a. Enter the desired text in the "Content" box, if applicable.

   Search Opportunity: Links to a page on which users can search through your university's and your partner organization's opportunities

   Organization Lookup: Links to a page listing your partner organizations

   Programs: Links to a page listing your programs

Home: Links to your public site's home page

Note: It is advised that each public site contains only one Home menu item.

    a. Enter the desired text in the "Content" box.

       Note: Any text content added here will override the text content of your "Home Content" widget (see item 6 of the Public Site Widgets section above).

Calendar: Links to a calendar of your public opportunities and trainings

    a. To edit a calendar's default settings, click **Preview**.

    b. Click on the menu item that links to the calendar.

    c. After the calendar opens, click **Edit Template**.

    d. Click the calendar's **edit icon**.

    e. In the "Edit Calendar Settings" window, select your desired default view and filter options for the calendar, then click **Save**.

External URL: Links to a designated external site

    a. Enter the desired site in the "External URL" field.

Team List: Links to a page listing your teams

Course Directory: Links to a page listing active courses

Faculty Directory: Links to a page listing your active faculty/staff

Organization Directory: Links to a page listing your associated organizations' details

4. In some menus, you can add an additional level to a menu item, or a *sub menu*. To add a sub menu, open the edit window for the menu in which it is located, locate the desired menu item, then click **Add Sub Menu** in its dropdown menu. The sub menu will appear on the page of its parent menu.

   Note: Do not add sub menus to menu items that link to external pages, as these sub menus will have no page on which to appear.

5. To rearrange the order in which the menu items appear, click and drag each item.

6. To edit a menu item, click **Edit**.

7. To delete a menu item, click **Delete** in its dropdown menu.

Update your Public Site's URL

You are able to customize the URL for your university's public site. The customization will appear at the end of the standard Fundly Connect™ public site URL, http://connect.fundly.com/site/.

♦ If your university desires more customization, Fundly Connect™ also offers a Vanity URL add-on in the Purchase Add-Ons section. A Vanity URL serves as a powerful marketing tool for a university to promote its brand to students and organizations.

1. Open the **Main Menu**, click **Website Integration**.

2. Click **Edit Site URL**.

3. Type the desired name for your new URL, then click **Save & Close**.

Create Opportunities

Universities can create basic and advanced opportunities to share with their students on Fundly Connect™. These opportunities can be created for your own university, or on behalf of a partner organization. After opportunities are created, universities can manage them by making edits, managing applicants, and assigning students.

👍 For opportunities created for your own university, be sure to follow the Approve, Reject, or Remove Students tutorial in the days and weeks after creating an opportunity. This will allow you to approve or reject students 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. Click the **Main Menu**, **Add New**, then click **Add Opportunity – Basic**.

Basic Information

1. At the top of the screen, keep the slider set to **Active**.
2. In the "On behalf of" dropdown menu, select the organization for which you are creating this opportunity. If you are creating this opportunity on behalf of your own organization, leave this field blank.
3. Select an Opportunity Owner.
    a. If you are creating this opportunity on behalf of your own organization, select the user who will be managing this opportunity from the "Opportunity Owner" dropdown menu. If the user who is currently logged in will be managing the opportunity, select **Me**. *Note:* University accounts are able to create multiple users, each with their own username and password. To create a user, follow the Manage User List tutorial.
    b. If you are creating this opportunity on behalf of an organization and wish to choose a different user, click **Change** under "Opportunity Owner." Then, click **Our Staff Users** to select a user from your own organization, or **Partner Organization Staff Users** to select a user from the partner organization. When done, click **Save**.
4. Enter the Opportunity Name.
5. If this opportunity will not take place at a physical location, set the **Virtual Opportunity** slider to "Yes."
6. 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**.
7. 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 students will be involved.

8. Under "Program(s), select the program(s) with which this opportunity is associated.
9. 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., Encoder) and an estimated hourly value (e.g., $10), if desired. Click **Save**.

    👍 Positions represent the different jobs a student might perform within an opportunity. Use them to help you coordinate students by designating different tasks to different positions in the same opportunity.

10. 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.
11. Under "Shift," designate the Start Time and End Time that the opportunity is available. Or, if the time frame can be set around a student's availability, activate the **Flexible Time** slider.
12. Click **Save & Next**.

Requirements

1. Under "Keywords," enter keywords related to the opportunity to help potential students 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 students 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 students to manage their own schedule, activate the **Student can schedule for this opportunity** slider.
4. If you wish to display this opportunity on your public calendar, activate the **Display on Public Calendar** slider.
5. If you wish to allow students to log their own hours, activate the **Student can log hours for this opportunity** slider.
   Note: The opportunity owner or organization must still verify all hours logged by students.
6. To require that a student's application be reviewed before they are allowed to volunteer for an opportunity, activate the **Approval required for student application** slider.
   Note: This option may not appear for opportunities created on behalf of another organization.
7. If a slider for **Background check required for Student** appears, keep it inactivated.
   Note: Background checks are an advanced feature not covered in this guide.
8. If a student must attend an orientation or training session before they can be considered a student, activate the **Orientation and/or training is required…** slider and select the desired training(s).
   Note: These sessions must have been previously created to be selected here.
9. Under "University Info", select the Opportunity Type, Course and CNCS funding of the opportunity.

♦ Selecting a course will restrict that opportunity to certain students. That means only the students who are under the course specified will be able to submit their application for the restricted course.

10. 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 students.

11. Under "Appropriate for which type of students," select all age groups that are appropriate for this opportunity.

12. If students may apply as a Group or Team, activate the **Groups/Teams are allowed to apply...** slider. To require information about each individual member of a group or team, active the **Team Member(s)' information required...** slider.

13. To require that students fill out an application form when they apply, you may add one under "Associate Application Form." To add a previously created form, select it from the "Application Form" dropdown menu. To create a new form, click **Add** and follow steps 3-7 from the Create an Application Form tutorial.

14. The "Auto Check Out" tool expedites the process of logging students' hours. Without this tool, universities must manually enter the number of hours a student has worked. With the tool, universities can automatically log hours based on the length of a student's assigned shift or schedule. The condition that you select from the "Auto Check Out Type" dropdown menu will determine the number of hours that are logged when "checking out" a student.
    Note: To check out students, follow the Log Hours Using the Attendance Tool tutorial.
    a. Shift End: Log hours according to the scheduled end time for the opportunity
    b. Student Schedule End Time: Log hours according to the end time that the student has scheduled
    c. After a set amount of time: Log a specified number of hours for all students who you check out for this opportunity

15. If you wish to have a student's hours automatically logged after using the check out tool (i.e., attendance tool), keep the **Auto Log Hours When Marked As Attended** slider activated.

    👍 When an opportunity involves a large volume of students or shifts, it is recommended that universities keep this slider activated and utilize the auto check out tool. This tool simplifies the logging of students' hours by eliminating the need to track or remember the schedule and hours of each individual student.

16. Next to **Allow Student(s) To Cancel Opportunity Before**, you can restrict a student's ability to cancel their shift(s) for an opportunity by entering the number of hours of notice needed by the university (i.e., entering "24" allows a student to cancel their shift up to 24 hours before it starts). If left blank, students can cancel a shift any time.

17. 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 your public site, click **Publish on Site**.
3. If you wish to publish this opportunity on another university's public site as well, check the box next to the name of the university under "Publish/Unpublish to Action Center."

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 Action Center** at the bottom right hand corner of the screen.
   Note: In order for your opportunity to be visible to the selected university's community of students, you must complete this step.
   Note: If the opportunity is associated with another university, they may need to approve your opportunity before it becomes visible to students.

Create an Advanced Opportunity

Advanced opportunities are more complex than basic opportunities and can include multiple locations, schedules, and student shifts. To add an advanced opportunity, begin in the Dashboard. Click the **Main Menu**, **Add New**, then click **Add Opportunity – Advanced**.

Basic Information

1. Follow steps 1-9 from the Basic Information section of the Create a Basic Opportunity tutorial above.

2. If this opportunity will take place at multiples 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 students can attend the opportunity based on their own availability, leave Start and End Times blank and activate the **Flexible Time** slider.

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, students will no longer be able to schedule for that date, shift and position.

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.

Manage your University's Opportunities

After creating opportunities for your university in Fundly Connect™, you must manage them. Your university can view all of its own opportunities, as well as details such as the number of students and hours contributed to each opportunity, in both list and calendar format. You can also use this section to edit, copy, delete, and inactivate your opportunities.

View your Opportunities

1. From the **Main Menu**, click **Opportunities**, then **Our Opportunities**. Alternatively, click **Active Opportunities** in the Dashboard.

2. A list of your university's active opportunities and their details 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**.

4. To view opportunities in a calendar format: Click **Calendar View** at the top of the screen.

a. The calendar displays only one opportunity at a time. Select the opportunity you wish to view from the "Volunteer Opportunity" dropdown. If desired, use the "Program" dropdown to filter opportunities.

b. To print a calendar, select the desired opportunity, then click **Print** at the bottom right corner of the screen. Select the period of time and the data you wish to include. Click **Print**. The calendar will be converted into a file, which you can save to your computer and print.

5. To view opportunities in a list format: Click **List View** from the calendar view.

Edit your Opportunities

1. From the **Main Menu**, click **Opportunities**, then **Our Opportunities**. Alternatively, click **Active Opportunities** in the Dashboard.

2. To edit an opportunity: Click **Edit** and follow the Create a Basic Opportunity or Create an Advanced Opportunity tutorial.

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 student 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**.

Manage Partner Organizations

As a university, you can manage the partner organizations that associate with you in Fundly Connect™. This includes approving or rejecting initial association requests, as well as editing, adding, (de)activating, and removing partner organizations.

Approve or Reject a Partner Organization

When an organization requests to associate with your university, you must approve or reject the request.

1. In the Dashboard, click **Organizations Awaiting Approval**. Alternatively, from the **Main Menu** click **Organizations**, then click the **Approval Pending** tab.

2. A list of organizations awaiting approval will appear.

3. To approve an organization: Click **Approve**.

> *Note:* If you wish to also approve or reject the organization's program associations, follow steps 3-5 from the Approve or Reject an Organization's Program Association tutorial.

4. To reject an organization: Click **Reject**.

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

View and Edit a Partner Organization

1. From the **Main Menu**, click **Organizations**. Alternatively, click **Active Organizations** in the Dashboard.
2. A list of your active partner organizations will appear. To view inactive organizations, click **Inactive** at the top of the screen.
3. To view the programs an organization is associated with: Click the **open icon** next to "Associated Programs."
4. To view details about an organization: Click **View** in its dropdown menu.
5. To edit details about an organization: Click **Edit** next to the desired organization. Make the desired changes, then click **Save** or **Save And Next** until you are done editing.

Add a Partner Organization

While organizations can apply to be a part of your university, you can also manually add a partner organization to your account.

Note: When adding a partner organization to your university, you have the option to create an account for the partner organization by checking the "*Send Account Setup Link to the Organization (primary email and username are required for this functionality)*". Otherwise, an account will not be created for the organization and your university must manage the organization internally.

1. From the **Main Menu**, click **Add New** then **Add Organization**. Alternatively, from the **Main Menu**, click **Organizations**, then click **Add Organization**. Alternatively, click **Active Organizations** in the Dashboard, then click **Add New Organization** at the bottom right corner of the screen.
2. Enter the organization's basic information. An Organization Name and a primary contact's First Name, Last Name, and Email address are required. When done, click **Save And Next**.
3. Select the Programs you wish the organization to be associated with. Click **Save And Next**.
4. If necessary, provide and save any additional information.

Reset a Partner Organization's Password

While partner organizations are able to reset their own passwords, some organizations may request help doing so.

Note: Do not reset an organization's password without their permission.

1. From the **Main Menu**, click **Organizations**. Alternatively, click **Active Organizations** in the Dashboard.

2. A list of your active partner organizations will appear. To view inactive organizations, click on **Inactive** at the top of the screen.
3. Click **Reset Password** in the dropdown menu next to the desired organization.
   Note: The password reset feature is not available for organizations that were added by your university using the Add a Partner Organization tutorial, as they have no account login or password.
4. In the "Reset Organization Password" window, enter the email address(es) to which you would like a temporary password sent. A temporary password will also will be sent to the organization's original user email.

Deactivate, Activate, or Remove a Partner Organization

1. From the **Main Menu**, click **Organizations**. Alternatively, click **Active Organizations** in the Dashboard.
2. To deactivate an organization: Click **Active** at the top of the screen. Then, click **Deactivate** in the organization's dropdown menu. It will now appear under your "Inactive" organizations.
   Note: Deactivating an organization allows you to reactivate it again, whereas removing an organization permanently removes it from your university.
3. To activate an organization: Click **Inactive** at the top of the screen. Then, click **Activate** in the organization's dropdown menu. It will now appear under your "Active" organizations.
   Note: You can only activate an organization that has previously been deactivated.
4. To remove an organization: Click **Remove Organization** in its dropdown menu, then click **OK**.
   Note: Removing an organization from your university's account does not affect the students who are scheduled for its opportunities.

   Note: Once an organization is removed, it must reapply to become associated with your university again.

Manage Partner Opportunities

When a partner organization posts an opportunity, your university has the ability to manage certain aspects of it. This includes approving or rejecting new opportunities, as well as editing, (un)publishing, and managing the calendar settings for existing partner opportunities.

Approve or Reject Partner Opportunities

If you selected "Review Required" for partner opportunities in your Opportunity Settings, you must either approve or reject each opportunity posted by a partner organization.

Note: If you wish to edit your settings regarding approval for partner opportunities, follow the Partner/Faculty Opportunity Review section of the Configurations/Settings tutorial.

1. In the Dashboard, click **Opportunities Awaiting Approval**. Alternatively, from the **Main Menu** click **Opportunities**, **Partner Opportunities**, then click the **Approval Pending** tab.
2. To view details about an opportunity before approving or rejecting it, click on **the opportunity name**.
3. To approve and publish an opportunity: Click **Approve And Publish** in its dropdown menu.
4. To approve an opportunity: Click **Approve**.
   Note: The opportunity will remain unpublished. If you wish to publish the opportunity, you must follow the Unpublish or Publish Partner Opportunities tutorial.
5. To reject an opportunity: Click **Reject** in its dropdown menu.

View Partner Opportunities

1. From the **Main Menu**, click **Opportunities** then **Partner Opportunities**. Alternatively, click **Active Partner Opportunities** in the Dashboard.
2. A list of your partner organizations' active opportunities will appear. To view inactive opportunities, click on **Inactive** at the top of the screen. To view both active and inactive opportunities, click on **All**.
3. To view details about an opportunity, click on **the opportunity name**.
4. To view opportunities that have been **Approved**, are **Approval Pending**, or **By Program**, click the desired tab.
5. To view filtered opportunities, using the filter bar at the top of the screen. Complete the desired fields, then click **Filter**.

Edit Partner Opportunities

As a university, you will be able to edit a partner's opportunity regardless if you created the opportunity on their behalf or they created it themselves.

1. From the **Main Menu**, click **Opportunities** then **Partner Opportunities**. Alternatively, click **Active Partner Opportunities** in the Dashboard.
2. Next to the desired opportunity, click **Edit** in its dropdown menu.
3. Follow the Create a Basic Opportunity or Create an Advanced Opportunity tutorial to make the desired changes.

Unpublish or Publish Partner Opportunities

While a university cannot inactivate a partner opportunity, it can unpublish an opportunity that has been published by a partner organization. Opportunities can continue to be published and unpublished as desired.

Note: As an exception, a university can inactivate a partner opportunity if it created the opportunity on an organization's behalf.

Note: An *unpublished* opportunity is removed from the university's database and site. An *inactivated* opportunity remains in the university's database and in its list of inactive opportunities.

1. From the **Main Menu**, click **Opportunities** then **Partner Opportunities**. Alternatively, click **Active Partner Opportunities** in the Dashboard.
2. To unpublish an opportunity: Next to the desired opportunity, click **Unpublish**.
3. To publish an opportunity: Click **Publish** next to the desired opportunity. Then, set your "Display On Calendar" status and click **Save and Publish**.
   Note: For some opportunities, you must instead click **Edit** and follow the <u>Publish</u> section of the <u>Create a Basic Opportunity</u> tutorial to republish.

Display or Hide Partner Opportunities from Calendar

You can choose to hide or display partner opportunities from your university's public calendar.

1. From the **Main Menu**, click **Opportunities** then **Partner Opportunities**. Alternatively, click **Active Partner Opportunities** in the Dashboard.
2. If you wish to display an individual opportunity on your public calendar, click **Display on calendar** in its dropdown menu.
3. If you wish to remove an individual opportunity from your public calendar, click **Hide from calendar** in its dropdown menu.
4. If you wish to restrict the types of opportunities (e.g., OneTime, Ongoing, Recurring) that appear on your public calendar, click **Settings**. To remove an opportunity type from appearing on the public calendar, inactivate its slider. When done, click **Save**.

Manage Students of Opportunities

Universities must manage the students who have applied or are volunteering for their opportunities. While universities are responsible for managing students of their own opportunities, they can also manage students of their partner opportunities.

Approve, Reject, or Remove Students

When a student applies for one of your university's own opportunities, you will receive an email notification. Follow your organization's standard screening process to approve or reject student applicants. If you did not select "Approval required for student application" during the opportunity creation process, all applicants are automatically approved unless removed from the opportunity.

Note: Universities do not have the ability to approve or reject students for partner opportunities, but they do have the ability to remove students who have already been approved.

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

👍 After students are accepted for an opportunity, be sure to follow the <u>Log or Verify Hours for a Student</u> tutorial as students begin accumulating hours.

Approve or Reject an Applicant

If you selected "Approval required for student 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 **Our Opportunities**. Alternatively, click **Active Opportunities** in the Dashboard.
2. Next to the desired opportunity, click **the number** that appears in the "Student Awaiting Approval" column.
3. To approve a student: Click **Approve**. If prompted, you may choose to review or not review the student's application form by clicking **Yes** or **No**, respectively.
4. To reject a student: Click **Reject** in the dropdown menu.

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

Remove a Student from an Opportunity

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

1. Click on the **Main Menu** then **Opportunities**.
   a. For students of one of your university's own opportunities, click **Our Opportunities**.
   b. For students of a partner opportunity, click **Partner Opportunities**.
2. Next to the desired opportunity, click **Manage Students** in the dropdown menu,
3. Next to the appropriate student, click **Remove Student**, then click **OK**.

   👍 After removing a student, follow up with a phone call or email to let them know.

View all Students of an Opportunity

1. Click on the **Main Menu** then **Opportunities**.
   a. For students of one of your university's own opportunities, click **Our Opportunities**.
   b. For students of a partner opportunity, click **Partner Opportunities**.
2. Next to the desired opportunity, select **Manage Volunteers** from the dropdown menu. A list of all of the opportunity's students will appear.
3. To create an Excel spreadsheet containing the students' names, contact information, and hours, click **Export** at the bottom right corner of the screen.
4. Follow your computer's prompts to open and save the file.

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. Click on the **Main Menu** then **Opportunities**.

a. For students of one of your university's own opportunities, click **Our Opportunities**.
Note: Alternatively, you can click **Manage Volunteers** and click **Assign to an Opportunity** in the dropdown menu of the desired student, then select the opportunity to which you wish to assign.

b. For students of a partner opportunity, click **Partner Opportunities**. For the desired opportunity, click on **the opportunity name**.

2. In the dropdown menu of the desired opportunity or at the bottom right corner of the screen, click **Assign Volunteer**.

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 your university's own opportunities.

1. From the **Main Menu**, click **Students** then **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 Student** 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.
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 Student," 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 Student" 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**.

Assign a Student to a Location

For opportunities occurring at multiple locations, organizations can assign students to a location.

👍 This tool is helpful when dividing large opportunities between multiple student coordinators. The workload can be easily divided by assigning each student coordinator to manage the students of a particular location using the Assign a Student Coordinator to an Opportunity tutorial.

1. Click on the **Main Menu** then **Opportunities**.
    a. For students of one of your university's own opportunities, click **Our Opportunities**.
    b. For students of a partner opportunity, click **Partner Opportunities**.
2. Next to the desired opportunity, click **Manage Students** in the dropdown menu.
3. Next to the desired student, click **Add Location** in the dropdown menu.
4. Select the desired location from the dropdown menu, then click **Add** or **Add New**.

Schedule a Student

Before a student can log hours for an opportunity, their shift and schedule must be set. Students may do this on their own, or you may do it for them. Universities can set schedules for students of both their

own opportunities and partner opportunities, but they cannot use the mass schedule change tool for students of partner opportunities.

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

Create a Schedule

1. Click on the **Main Menu** then **Opportunities**.
   a. For students of one of your university's own opportunities, click **Our Opportunities**.
   b. For students of a partner opportunity, click **Partner Opportunities**.
2. Next to the desired opportunity, click **Manage Students** in the dropdown menu.
3. Next to the desired student, click **Scheduling** in the "Next Step" column.
   Note: If the student has not signed up for or attended all required training sessions, "Pending Orientation & Training" or "Pending Attendance" will appear. Follow the Assign a Student to a Training Session or Mark Attendance for a Training Session tutorial if you wish to assign or mark attendance for the student.

   Note: If the student 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 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.

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. Click on the **Main Menu** then **Opportunities**.
   a. For students of one of your university's own opportunities, click **Our Opportunities**.
   b. For students of a partner opportunity, click **Partner Opportunities**.
2. Next to the desired opportunity, click **Manage Students** in the dropdown menu.
3. Next to the desired student, 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 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. Click on the **Main Menu** then **Opportunities**.
   a. For students of one of your university's own opportunities, click **Our Opportunities**.
   b. For students of a partner opportunity, click **Partner Opportunities**.
2. Next to the desired opportunity, click **Manage Students** in the dropdown menu.
3. Next to the desired student, click **Add Schedule** in the dropdown menu.
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 student, click **Save**. If you wish to create another schedule, click **Save & Add New**. Set the new schedule, then click **Save**.

Make Mass Schedule Changes

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

Note: Mass schedule changes can only be made for your university's own opportunities.

1. From the **Main Menu**, click **Students** then **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 4-5 of 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.

Log or Verify Hours for a Student

Once a student has been scheduled, they can begin logging their hours. Universities must verify hours logged by their students. Universities can also log hours for students either manually, with the quick log tool, or with the attendance tool. Universities can manually log and verify hours for students of both their own opportunities and partner opportunities, but they cannot use the quick log or attendance tools for students of partner opportunities.

👍 To ensure the accuracy of students' hours, do not verify or log hours on behalf of partner organizations unless asked to do so.

◆ With the "Time It!" add-on feature, an organization can allow its students to log their own hours in real time while volunteering for an opportunity. By entering their unique pin numbers into a computer or mobile device located on-site, students can time-in (i.e., clock-in) when they arrive to an opportunity and time-out (i.e., clock-out) when they leave.

Verify Hours Logged by a Student

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

1. Click on the **Main Menu** then **Opportunities**.
    a. For students of one of your university's own opportunities, click **Our Opportunities**.
    b. For students of a partner opportunity, click **Partner Opportunities**.
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. Click on the **Main Menu** then **Opportunities**.
    a. For students of one of your university's own opportunities, click **Our Opportunities**.
    b. For students of a partner opportunity, click **Partner Opportunities**.
2. Next to the desired opportunity, click **Manage Students** in the dropdown menu.
3. Next to the desired student, click **Log Hours** in the "Next Step" column.
   Note: If the student has not signed up for or attended all required training sessions, "Pending Orientation & Training" or "Pending Attendance" will appear. Follow the Assign a Student to a Training Session or Mark Attendance for a Training Session tutorial if you wish to assign or mark attendance for the student.

   Note: If the student has not set a schedule for this opportunity, "Scheduling" will appear. To set their schedule, click **Scheduling** and follow steps 4-6 of the Create a Schedule tutorial.

4. Select the student's assignment.
   Note: Only schedules set for the volunteer will show under the assignment dropdown.
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/Add Hours Tool

To log hours for an event or a student in bulk and with different number of hours, use the "Quick Log/Add Hours" tool.

Note: The quick log tool can only be used for students of your university's own opportunities.

1. Click the **Main Menu**, then click **Add New** then **Add Hours**.
2. Select the desired opportunity. Volunteers who are assigned to the opportunity will populate the list below.
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.

Note: To edit the settings for this tool, follow steps 13-14 of the Requirements section of the Create a Basic Opportunity tutorial.

Note: The attendance tool can only be used for students of your university's own opportunities.

1. From the **Main Menu**, click **Our Opportunities**. Alternatively, click **Active Opportunities** in the Dashboard.
2. Next to the desired opportunity, click **Manage Students** in the dropdown menu.
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**, which also allows you to enter the "reason for no show". Alternatively, to check in *all* of the students listed, click **Check In All**. You can also click the middle of the slider to "reset" their attendance status to nothing.
   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.

View and Edit Logged Hours

View Logged Hours for an Opportunity

1. Click on the **Main Menu** then **Opportunities**.
   a. For one of your university's own opportunities, click **Our Opportunities**.
   b. For a partner opportunity, click **Partner Opportunities**.
2. Next to the desired opportunity, click **the number** indicating "Verified Hours" to view a breakdown of the hours that have been logged and verified for the opportunity.

View and Edit Logged Hours for a Student

1. Follow the <u>View and Edit a Student's Profile</u> tutorial to locate the profile of the desired student.
2. On the student's profile, click on the **Opportunity List** tab.
3. Next to the desired opportunity, click **the number** in the "Verified Hours" column. If a window opens displaying multiple schedules, click **the number** in the "Verified Hours" column of the desired schedule to view a breakdown of the hours that have been logged and verified.
4. In this window, you can also edit the student's hours. To do so, edit the "Description" and/or "Hours" columns, then click **Save**.

Manage Students' Accounts

To better manage their students, organizations have the ability to edit students' accounts. These tools allow you to create student accounts, edit profiles, assign tags, reset passwords, and (de)activate or remove students.

Manually Create a Student's Account

On occasion, it becomes necessary to manually create a student's account instead of relying on the student to create their own account.

1. Click the **Main Menu**, then click **Add New** then **Add Student**. Alternatively, from the **Main Menu**, click **Students**, then **Add Student**. Alternatively, click **Active Students** on the Dashboard, then click **Add New Student** at the bottom right corner of the screen.
2. Enter the student's personal information (only first and last names are required).
3. To allow the student to manage their own account, check the Send Account Setup Link to the student box at the top. Enter an email address for the student.

   👍 This is highly recommended, as it allows the student to personalize their own account.
4. Click **Save**.
5. After saving, several tabs will become available in which you can provide additional information about the student. If desired, complete each tab, clicking **Save and Next** or **Save** after each.

Search for Students

Universities can conduct searches to locate students. Basic searches locate individual students by name, while advanced searches locate multiple students based on specified criteria (e.g., zipcode, hours volunteered, skills). Searches also provide access to students' profiles, where you can review a student's activity and account information.

1. A **Search field** can be found on the top left of the screen.

a. To search for an individual student, enter the student's name in the search bar. Press **Enter** on your keyboard and proceed to step 6.
b. To conduct an advanced search, click **Advanced Search**.
   Note: You can also access the advanced search tool by clicking **Main Menu**, then **Students** then **Search Student**.

2. Under "Student Information," fill in any criteria you wish to use to narrow your search.
3. Under "Other Criteria," add any additional criteria. Follow steps 1-8 of the Select Recipients section of the Send Advanced Communication tutorial for help.
4. When done, click **Search**. A list of students who match your search will appear.

   👍 As a shortcut to using the Default Reports and Custom Reports features, try conducting an advanced search for students and clicking the **Export** button. Fundly Connect™ will generate an Excel file of the students who match the search.

5. If you wish to edit your search criteria, click **Update Search** at the top right corner of the screen, enter the desired criteria, and click **Save**.
6. To view a student's profile, click on the name of the student.

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. Universities can also 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. Open the desired student's profile using the Search for Students tutorial.
2. To edit the student's information, click **Edit Student**.
3. Make the desired changes, then click **Save and Next**.
4. When done, click **View Student** to return to the student's profile.

Assign Tags to Students

A tag is a flag that can then be used to quickly identify a specific group of students. Tags are created in the Tags section of the Configurations tutorial and can be assigned to students here.

👍 To locate all students who have a specific tag, conduct a Search for Students and select the tag in the "Criteria" section.

1. From the **Main Menu**, click **Students** then **View All**. Alternatively, click **Active Students** in the Dashboard.
2. To assign tag(s) to an individual student: Click **Assign Tag(s)** in the student's dropdown menu. Select the desired tag(s), then click **Assign**.

3. To assign tag(s) to multiple students: Check the boxes next to the names of the desired students. Then, select **Assign Tag(s)** from the "Selected Students" dropdown menu. Select the desired tag(s), then click **Assign**.
4. To assign tag(s) to all of the students listed: Select **Assign Tag(s)** from the "All Search Results" dropdown. Select the desired tag(s), then click **Assign**.

Schedule Time Off for a Student

The Time Off feature allows you to schedule a "leave" for students while at the same time cancelling all their scheduled opportunities on those dates. This will also remind you not to schedule the student since the student is unavailable on those dates.

Note: Use the "Time Off" only when the student is temporarily taking a time off from volunteering.

1. Open the desired student's profile using the Search for Students tutorial above.
2. To schedule the student's time off, click **Schedule Time Off.**
3. Select which type of Time Off (e.g. Vacation) you're scheduling. The selection will differ depending on your Time Off configuration.
4. Set the "From" and "To" dates which will cover the dates of the student's time off.
5. The "Reason" field is optional.
6. Click **Next**.
7. If there are student schedules that fall within the Time Off dates, it will display those impacted opportunities and you'll have to click **Confirm and Proceed**.
8. After the Time Off is saved, it will cancel the student schedules and you will find this Time Off under the student's "Vacation History".

Reset a Student's Password

While students are able to reset their own passwords, some students may request help doing so.

Note: Do not reset a student's password without their permission.

1. Conduct a search for the student using the Search for Students tutorial. Alternatively, from the **Main Menu** click **Manage Students**. Locate the student, click **Reset Password** in the student's dropdown menu, and skip to step 3.
2. A list of students who match your search will appear. Click **Reset Password** in the dropdown menu next to the desired student's name.
   The password reset feature is not available on a student's profile and must be accessed from the list view.
3. A temporary password will be sent to the student's email address.

Deactivate or Activate a Student

If you wish to temporarily remove a student from your university, you can deactivate the student and then reactivate the student in the future. If you wish to permanently remove a student from your university, follow the Remove a Student from your University tutorial below instead.

1. From the **Main Menu**, click **Students** then **View All**. Alternatively, click **Active Students** in the Dashboard.
2. To deactivate students:
   a. To deactivate individual students: Click **Deactivate** in the student's dropdown menu.
   b. To deactivate multiple students: Check the boxes next to the names of the desired students. Then, select **Deactivate Student(s)** from the "Selected Students" dropdown menu and click **Apply**.
3. To activate students:
   Note: You can only activate students that have previously been deactivated.
   a. To activate an individual student: Click **Activate** in the student's dropdown menu.
   b. To activate multiple students: Check the boxes next to the names of the desired students. Then, select **Activate Student(s)** from the "Selected Students" dropdown menu and click **Apply**.

Remove a Student from your University

Rather than deactivating a student, you may choose to permanently remove a student from your university's account. **Removing a student also deletes all of the student's data (e.g., verified and unverified hours) from your university's account. This action cannot be undone.**

👍 Once your university deletes a student, it will lose access to all data associated with them, including hours and contact information. Before deleting a student, consider creating reports of their hours for your records.

1. From the **Main Menu**, click **Students** then **View All**. Alternatively, click **Active Students** in the Dashboard.
2. Click **Remove Student** in the desired student's dropdown menu.
3. Read and complete the "Confirm Delete" screen, then click **OK**.

Faculty/Staff

Faculty and staff members of the university have the ability to sign up on the university's public site. This will allow them to have a Fundly Connect™ account and be associated with the university. On the other hand, the university can also create an account for the faculty from the back end.

Manually Create a Faculty/Staff's Account

On occasion, it becomes necessary to manually create a faculty/staff account.

1. From the **Main Menu**, click **Faculty/Staff**, and then click **Add New Faculty/Staff**.
2. Enter the faculty/staff member's personal information (only first and last names and title are required).
3. To allow the faculty/staff member to manage their own account, check the Send Account Setup Link to the Faculty/Staff box at the top. Enter an email address for the faculty/staff.

   👍 This is highly recommended, as it allows the faculty/staff member to personalize their own account.

View and Edit a Faculty/Staff's Profile

All of a faculty/staff's account information (e.g., contact information, courses) can be found on their faculty profile. Universities can also edit a faculty/staff profile.

👍 A faculty/staff's profile includes their personal preferences and information. Do not edit a faculty/staff's profile unless they request your help or you need to add information for administrative purposes.

1. From the **Main Menu**, click **Faculty/Staff**.
2. To view and/or edit the faculty/staff's information, open the desired faculty/staff's profile by clicking their **name**. Alternatively, you can click **Edit** next to the faculty/staff's name.
3. Make the desired changes, then click **Save**.

Import Utility

The import utility feature allows universities to import schools, departments, courses and faculty by batches. This feature is only available to universities and not to VACs or organizations.

Create Import Batch

1. From the **Main Menu**, click **Import Utility.**
2. Under the Import Details tab on the import wizard, enter the batch title and import type (i.e. school, department, course or faculty). Then, click **Save and Next**.
3. Under Upload the File, drop the file on the field or click the field to select the document to upload. Then, click **Save and Next**.

   👍 It is recommended to import a CSV file, but an XLSX file is supported as well.
4. Under Map Fields, map your column names to the corresponding field names in Fundly Connect™. Then, click **Save and Next**.

Note: Columns that are not mapped will not be imported.

5. You will have the option to save your mapping for future use by entering a name for the saved mapping then clicking **Save**. Click **Cancel** to not save the mapping.
6. Under Preview, review the data to be imported. Click **Confirm & Import** to proceed.
7. The page will redirect to the Import Batch Listing page where you will see the batch import along with its status.
   a) *Importing Data*
   b) *Processing Completed*
   c) *Validation Completed – Errors*
8. Once the batch import is completed, an email is sent to the admin of the completion and status.

Re-validate and Import

If the batch import results in an error, you will be able to review and edit the invalid/missing data.

1. From the Import Batch List, click the **Review** button of the desired batch import. The page will then display the errors on that specific batch import.
2. To upload an entirely new document, click **Upload a New File**.
3. To only edit the erroneous record/s, click **Edit Invalid/Missing Records**.

   👍 It is advisable to use the edit option when errors are few.

Create and Manage Programs

Universities have the ability to add "programs" to their Fundly Connect™ accounts. Programs are used to represent recurring events or projects directed by your university, such as an annual day-of-service or a community clean-up. Your partner organizations can request to associate with your university's programs; once associated, these partners can post opportunities under the program. Programs and their associations must be actively managed by your university.

Create a Program

1. From the **Main Menu**, click **System Configurations** then **Programs.** A list of your university's programs will appear, including data regarding the number of organizations, students, and hours associated with each.
2. To add a program, click **Add New Program** at the bottom right corner of the screen.
3. To inactivate this program, set the slider to **Inactive**.
4. Enter a Name for the program.
5. Select any Program Sponsors who support this program.
   Note: To select a program sponsor, it must have been previously configured by your university. To add a sponsor, follow the Sponsors section of the Configurations tutorial.
6. Select any Agreements that you want students and/or organizations to consent to before participating in this program.

Note: To add an agreement, follow the <u>Agreements</u> section of the <u>Configurations</u> tutorial.

7. To add a logo, click on **Click here OR Drop file here**. Select the desired document from your computer.
8. If you wish to display the program on your university's public site, activate the **Display on public site** slider.
9. If you wish to review organizations before they can post opportunities associated with this program, activate the **Organization approval required** slider.
   Note: If activated, review the <u>Approve or Reject an Organization's Program Association</u> section of the <u>Manage Program Associations</u> tutorial.
10. If you wish to review all opportunities associated with this program before they are accepted to the program, activate the **Opportunity approval required** slider.
    Note: If activated, review the <u>Approve or Reject an Opportunity's Program Association</u> section of the <u>Manage Program Associations</u> tutorial.
11. If you wish to review a student's application before they can student for an opportunity associated with this program, activate the **Student application needs review for this program** slider.
    Note: If activated, review the <u>Approve or Reject a Student's Program Association</u> section of the <u>Manage Program Associations</u> tutorial.
12. If you wish to display the opportunities associated with this program on your university's public site, activate the **Opportunities posted for the program is available on public site** slider.
13. Enter a description of the program in the "Body" field. If desired, you can use the formatting options available.
14. When done, click **Save**.
15. To edit a program: Click **Edit**. Make the desired edits, then click **Save**.
16. To delete a program: Click **Delete** in the dropdown menu, then click **OK**.

Program Level Security

After creating a program, universities can select which users have the ability to administrate the program. If an opportunity is attached to a program, only users who have been assigned to that program will be able to see and manage the opportunity from their user accounts.

Note: If you want a user to manage opportunities that are attached to a program, be sure to manually assign the user to the program.

1. From the **Main Menu**, click **System Configurations** then **Program Level Security.**
2. To assign users to a program, locate the desired program. Click the "Select User(s)" field and check the box(es) next to the desired user(s). Then, click **Assign Users**.
3. Alternatively, to assign program(s) to a particular user, click the "By User" tab. Next to the desired user, click the "Select Program(s)" field and check the box(es) next to the desired program(s). Then, click **Assign Program**.
4. To delete a user or program: Click **Remove** next to the desired user or program.

Manage Program Associations

Universities are responsible for managing and policing their program associations. If your university activated the organization, opportunity, or student approval/review required sliders when creating a program, you must approve or reject each party before it can participate in the program. While any of your partner organizations can request to associate and post opportunities with a program, not all of these organizations or opportunities will always be relevant to the program.

👍 There is currently no notification to alert you to organizations, opportunities, or students awaiting approval for a program, so it is important that your university regularly follows the "Approve or Reject" tutorials below to check for pending requests.

Approve or Reject an Organization's Program Association

Your university can approve or reject an organization's request to associate with one of your programs. Here, you can also simply view your partner organizations' program associations.

Note: If you wish to edit your settings regarding organization approval for programs, follow the Create a Program tutorial.

1. From the **Main Menu**, click **Organizations**. Alternatively, click **Active Organizations** in the Dashboard.
2. A list of your active partner organizations will appear. To view inactive organizations, click **Inactive** at the top of the screen.
3. Below the desired organization, click the **open icon** next to "Associated Programs" to view the organizations program associations. The selection that is highlighted in green indicates the current status of the program association.
4. To approve a program association: Click **Approved**.
5. To reject a program association: Click **Rejected**.

Add or Remove an Organization from a Program

If you wish to manually add or remove a partner organization from a program, you may do so by editing the organization's preferences.

1. From the **Main Menu**, click **Organizations**. Alternatively, click **Active Organizations** in the Dashboard.
2. A list of your active partner organizations will appear. To view inactive organizations, click on **Inactive** at the top of the screen.
3. Next to the name of organization that you wish to add to or remove from a program, click **Edit**.
4. Click the **Programs** tab.
5. To add the organization to a program: Check the box next to the program's name.
6. To remove the organization from a program: Uncheck the box next to the program's name.
7. When done, click Save.

Approve or Reject an Opportunity's Program Association

Just as your university can approve or reject an organization's request to associate with one of your programs, you can also approve or reject an individual opportunity's association with a program.

Note: If you wish to edit your settings regarding opportunity approval for programs, follow the Create a Program tutorial.

1. From the **Main Menu**, click **Partner Opportunities**. Alternatively, click **Active Partner Opportunities** in the Dashboard.
2. Below the desired opportunity, click the **open icon** next to "Associated Programs." The selection that is highlighted in green indicates the current status of the program association.
3. To approve a program association: Click **Approved**.
4. To reject a program association: Click **Rejected**.

Approve or Reject a Student's Program Association

While students cannot associate with a program, if your university activated the "Student application needs review for this program" slider when creating a program, you must approve or reject each student who applies for an opportunity that is associated with the program.

Note: If you wish to edit your settings regarding student review for programs, follow the Create a Program tutorial.

1. From the **Main Menu** click **Opportunities** then **Partner Opportunities**.
2. Next to the desired opportunity, click **the number** that appears next to "Pending Students." The "Pending Students" window will open.
3. To approve a student: Click **Approve**.
4. To reject a student: Click **Reject** in the dropdown menu.
5. Repeat for each opportunity, if desired.

Basic Communication

Universities can communicate with both students/faculty/staff and partner organizations directly through their Fundly Connect™ accounts. Basic communication refers to a simple email containing text and attachments. If you are communicating with a large number of students or organizations, or if you wish to use a template, it is recommended that you follow the Advanced Communication tutorial instead.

Send Basic Communication to Students/Faculty/Staff

Use one of the methods below to send basic communication to a single or small number of students/faculty/staff.

1. If you know the name(s) or email address(es) of the desired recipient(s):

a. Click the **Inbox** found at the top left corner of the screen.
b. Under the Inbox tab, click **Compose**.
c. Next to "To," select **Student/Faculty/Staff**.
d. Type the name of a student/faculty/staff in the "To" field and click on their name when it appears, or enter the student's or faculty's email address. Continue adding students/faculty, pressing **Enter** on your keyboard after each entry.

2. If you wish to search for students using advanced criteria (e.g., City, Skill):
   a. Conduct an advanced search for the students with whom you wish to communicate using steps 1-4 of the Search for Students tutorial.
   b. In the list of students, check the boxes next to the names of the desired students.
   c. To email all of the students listed, select **Send Email** from the "All Search Results" dropdown menu. 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 "Selected Students" dropdown menu.

3. If you wish to send basic communication to *all* of your students:
   a. From the **Main Menu**, click **Students** then **View All**.
   b. Select **Send Email** from the "All Search Results" dropdown menu, then 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. If you wish to set or edit your email signature, click on **Click here to set Email Signature**. Follow the User Profile section of the My Profile tutorial for help.
   Note: This step will redirect you to a new page, resulting in a loss of your work.

7. To use an existing template for this email, select it from the "Template" dropdown menu.
   Note: Only templates saved using the method listed in step 8 below will appear in this dropdown menu.

8. 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.

9. Enter the content of your email in the "Body" field. If desired, you can use the formatting options available.

10. 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.

11. 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.

Send Basic Communication to Organizations

Use one of the methods below to send basic communication to a single or small number of organizations.

1. If you wish to communicate with a single or small number of your partner organizations:
    a. Click the **Inbox** found at the top left corner of the screen.
    b. Under the Inbox tab, click **Compose**.
    c. Next to "To," select **Organization**.
    d. Type the name of an organization in the "To" field and click on its name when it appears, or enter the organization's email address. Continue adding organizations, pressing **Enter** on your keyboard after each entry.
    e. Continue to step 3 below.
    Alternatively:
    a. From the **Main Menu**, click **Organizations**.
    b. In the list of organizations, check the boxes next to the name(s) of the desired organization(s).
    c. Select **Send Email** from the "Action" dropdown menu, then click **Apply**.
    d. Continue to step 3 below.
2. If you wish to send basic communication to *all* of your partner organizations:
    a. From the **Main Menu**, click **Organizations**.
    b. Select **Send Email to All** from the "Action" dropdown menu, then click **Apply**.
3. To compose and send an email to your selected partner organization(s), follow steps 4-11 of the Send Basic Communication to Students tutorial.

Advanced Communication

Universities can communicate with both students and partner organizations directly through their Fundly Connect™ accounts. Advanced communication refers to complex forms of communication that contain more than just text, such as newsletters. This method allows you to use templates and filter recipients.

Send Advanced Communication

Use the method below to communicate with a large number of students or partner organizations.

Before proceeding, consider the following options for creating advanced communication:

    a. If you wish to create a template (e.g., newsletter, student appeal) that your university will reuse, complete both the Create a Communication Template and Populate a Communication Template tutorials before proceeding.
    b. If your communication does not require a customized template, proceed below.

    c.   If you have completed this section for another piece of communication and wish to utilize the same recipient list and settings, follow the View Newsletters tutorial to create a copy of the existing piece of communication.

Setup Newsletter

This page allows you to add information about the sender and subject of the email, select a communication template, and add attachments.

1. From the **Main Menu**, click **Communications** then **Create New Communication**.
   Note: To email all students of a particular opportunity, click **Active Opportunities** in the Dashboard. Next to the desired opportunity, click **Communicate** in the dropdown menu. Be sure to skip the Select Recipients section below.
   Note: To email all of your partner organizations, click **Active Organizations** in the Dashboard. Select **Communicate to All** from the "Action" dropdown menu, then click **Apply**. Be sure to skip the Select Recipients section below.

2. Create a Name to help you identify this piece of communication (i.e. September 2018 Newsletter).

3. Enter the Sender Name, Sender Email, and a Subject for the email.

4. Select the Recipients Type for this communication.

5. Select the desired template under "Communication Template." To preview the template, click **Preview**.

       a.   To communicate using a template that you have already created and populated, select it under "Communication Template." To make changes to the selected template, click **Edit Template** and use the Create a Communication Template tutorial for help.
   ***Note:* Edits made to a template are irreversible and will result in a loss of the original template.**

       b.   To create and populate a template now, click **Create New Template**. Use the Create a Communication Template and Populate a Communication Template tutorials for help.

6. To add a document or image to this email, click on **Click here OR Drop file here** under "Attachment." Select the desired document from your computer.

7. Click **Save and Proceed**.

Select Recipients

To narrow down your recipient list, you must set criteria to identify users to whom the email is relevant. By default, the system will only send the newsletter to users who have added an email address and have selected email as their communication preference.

1. In the "Select Criteria" dropdown menu, select the first criteria you'd like to apply to recipients.

2. In the "Select Operator" dropdown menu, select an operator to apply to the above criteria. Operators are explained below.

       a.   **Between/Not Between:** Criteria falls inside or outside a set range

       b.   **Contains/Does Not Contain:** Criteria contains or does not contain a word or phrase

       c.   **Ends With/Starts With:** Criteria ends or starts with a word or phrase

d. **Greater Than/Less Than:** Criteria is "greater than" or "less than" a number, date, etc.

e. **Greater Than Or Equal To/Less Than Or Equal To:** Criteria is "greater than or equal to" or "less than or equal to" a number, date, etc.

f. **Is Empty/Is Not Empty:** User did or did not provide information for the criteria

g. **Is False/Is True:** User does or does not match simple yes/no criteria

h. **Is In The Last/Is Not In The Last:** Criteria did or did not occur in the last X number of days, weeks, months, or years

i. **Is/Is Not:** Criteria does/does not match specific word, phrase, number, etc.

j. **In/Not In:** Criteria does or does not match selections (useful for criteria such as cause or skill that include a list of options to select from)

3. Many criteria require that additional fields be completed. If prompted, fill in the remaining fields to complete the operator (i.e., type a word or phrase, type a number, set date(s), select dropdown items).

4. If prompted and desired, select a Grouping Option.
Note: This feature is not required and exists only for users desiring an additional level of complexity.

5. Criteria is organized into groups. To add additional criteria to this group, click the **add icon** *inside* the gray box and repeat steps 1-4. Continue adding criteria until the group is complete.

6. In the "Match" dropdown menu, select **All** to set recipients to those who match all of the criteria in this group, or select **Any** to set recipients to those who match any of the criteria in this group.

7. To add an additional group of criteria, click the **add icon** *outside* the gray box and repeat steps 1-6.
Note: Each group of criteria is considered a separate search. Users only need to match one group of criteria to be included in the recipient list.

8. The "Add Sub Group" feature will not be covered in this tutorial and exists only for users desiring an additional level of complexity.

9. When done setting all of your criteria, click **Search**.

10. Click the **# of recipient(s)** to view the names of all recipients that match your criteria. When done, click **Close**.
Note: Conducting another recipient/criteria search will override your previous search.

11. To add additional recipients, enter their email addresses under "Other Recipient(s)," pressing the "enter" key on your keyboard after each entry.
Note: Placeholders within the template will not be filled in for recipients without Fundly Connect™ accounts.

12. Click **Save and Proceed**.

Confirm

1. To preview or test this communication before sending it to your recipients, enter an email address in the "Send a Test email" field. Then, access that email address for a preview.
Note: Placeholders within the template may not be filled in for test emails.

2. To send the communication to your recipients, click **Send**.

a. Select **Send Now** to send the communication immediately.
b. Select **Send On** to send the communication at a later time, then select the date and time.
c. When done, click **Send**.

Create a Communication Template

With Fundly Connect™, your university can create and customize templates to communicate with students/faculty/staff and partner organizations. Templates are especially useful for recurring communication purposes, such as weekly newsletters or student appeals. Please note that in this section, you are only creating the template. Every time you send the template to students/faculty/staff or organizations, you will need to populate it with information using the method described in the Populate a Communication Template tutorial.

1. From the **Main Menu**, click **Communications** then **Templates**.
2. At the bottom right corner of the screen, click **Add Template**.
3. Select one of the provided template types by clicking its **check mark(✓)**. The Add/Edit Template page will open.
4. To name this template, click the **edit button** at the top of the screen.
5. Enter a Code (a unique identifier to distinguish templates with the same name), Name, and Sub Category, if desired. Click **Save**.

Add Widgets

👍 Periodically save your work by clicking **Save** at the bottom of the widget menu. Click **Restore** to undo changes made since you last saved your work.

1. Content is added to templates in the form of widgets. Click **Widgets** at the right of the screen to access the widget menu.
2. To add a widget to the template, **click and drag the widget type** to the body of the template on the left. The contents of each widget type are explained below.
    a. **Button:** Button linking to a URL of your choice
    b. **Divider:** Horizontal line to divide sections
    c. **Image:** Image only
    d. **Image Text Button:** Image, text box, and button
    e. **Social Media:** Icons linking to your organization's social media accounts
    f. **Text:** Text box only
    g. **Two Column:** Text box that appears in two columns
3. After a widget is added to the template, an edit menu will appear at the right of the screen.
    a. To edit the widget now, follow steps 2-4 from the Edit Widgets tutorial below.
    b. To edit the widget later, click **Close** in the edit menu.
4. Continue adding widgets to the template as desired.
5. To delete a widget: Hover over it and click the **trashcan icon** in its toolbar.
6. To copy a widget: Hover over it and click the **copy icon** in its toolbar.

7. To change the order of the widgets: **Click and hold the toolbar** at the top of a widget, drag to the desired location, and release.
8. When done, continue below to begin editing.

Edit Widgets

☝ Periodically save your work by clicking **Save** at the bottom of the widget menu. Click **Restore** to undo changes made since you last saved your work.

1. To edit a widget that has already been added to the template, hover over it and click the **edit icon** in its toolbar.
2. Each widget type has different formatting options. The following options appear in the edit menu's "Content" tab for various widgets.
   a. **Button Align:** Align button to the left, center, right, or default
   b. **Button Link:** Enter the URL you wish a button to link to
   c. **Button Text:** Enter the text you wish a button to display (e.g., Read More, Register)
   d. **Facebook/Linked In/Twitter:** Add URLs that link to social media accounts
   e. **Image:** Add an image from your computer and edit it with the "Photo Editor" window
   f. **Image Align:** Align image to the left, center, right, or default
   g. **Image Alter Text:** Enter the text you wish to appear in place of an image that doesn't load
   h. **Image Height/Width:** Adjust the height and width of an image
   i. **Image Link:** Enter the URL you wish an image to link to
   j. **Left/Right Column Width:** Adjust the left and right column width
   k. **Left/Right Content:** Enter and format the text to appear in the left & right text columns; Use placeholders to auto-populate the text with information specific to each recipient
   l. **Swipe Column:** Affects formatting on mobile devices
   m. **Text Content Align:** Align text to the left, center, right, or default
   n. **Text Content:** Enter and format the text to appear in the text box; Use placeholders to auto-populate the text with information specific to each recipient
3. The following options appear in the edit menu's "Style" tab for various widgets.
   a. **Align:** Align content to the left, center, or right, or justify
   b. **Background Color:** Set the color to appear in the background of an image or text
   c. **Border Color:** Set the color of a border or divider
   d. **Border Style:** Set a border or divider as solid, dotted, dashed, or none (remove)
   e. **Bottom/Top/Left/Right Space:** Adjust the amount of space around the text in a button
   f. **Border Width:** Adjust the width of a border or divider
   g. **Corners Radius:** Adjust the roundness of a button's corners
   h. **Font:** Set the font of text
   i. **Font Color:** Set the color of text
   j. **Font Size:** Adjust the size of text
   k. **Height:** Adjust the height of an image
   l. **Margin:** Adjust the amount of space around a button
   m. **Padding:** Adjust the amount of space around content

n. **Width:** Adjust the width of an image
4. When done editing a widget, click **Close** in the widget edit menu.

Edit Layout

1. To edit the layout of the template, click **Layout** at the right of the screen.
2. Set the layout for the frame, including background color, width, and border preferences.
3. Set the layout for the page, including background color and font preferences.
4. When you are done creating this template, click **Save**.
5. To return to your list of communication templates, click the **return icon**.

Populate a Communication Template

Once your university has created a template using the Create a Communication Template tutorial, you can create a copy of it to populate with information before sending to students/faculty/staff or partner organizations. When you are done populating the template, you can send it using the Send Advanced Communication tutorial.

1. From the **Main Menu**, click **Communications** then **Templates**.
2. Hover over the template you wish to use and click the **copy icon** to create a duplicate.
   Note: **If you do not create a duplicate of the template, all changes will be made to the original template and will result in a loss of the original template.**
3. The Add/Edit page of the template's copy will appear.
4. To name this template, click the **edit button** at the top of the screen.
5. Enter a Code (a unique identifier to distinguish templates with the same name), Name, and Sub Category, if desired. Click **Save**.
6. Follow the Edit Widgets tutorial to populate the template with text, images, and URLs.
7. When done, click **Save**.

Create and Manage Invites

As a university, you are able to create and send invites to solicit students and teams to participate in one of your opportunities. These invites are created using preexisting Fundly Connect™ templates. After an invite is sent, you can view email analytics and track recipients' responses.

Note: Invites are not included in your "Communication History."

Create an Invite

1. From the **Main Menu**, click **Our Opportunities**. Alternatively, click **Active Opportunities** in the Dashboard.
2. Click on **the name of the opportunity** for which you wish to send an invite.
3. On the left of the screen, click **Invites**.
4. To create an invite, click **Create Invite** at the bottom right corner of the screen. The invite "Setup" page will open.

5. By checking the Track not attending responses box, recipients who choose not to attend the invite will be required to provide a reason for not attending.
6. Enter the Sender Name, Sender Email, and a Subject for the invite.
   Note: The Sender Email should be one that is associated with your organization. This will enable you to receive all replies.
7. Under "Invite Template," select the template you wish to use for this invite. To preview a template, click **Preview**.
   a. If you have previously created an invite template that you wish to use now, select it from the "Select Template" field. To make changes to the template, click **Edit Template** and skip to step 9 below. To continue without making edits, skip to step 21 below.
      Note: Edits made to a template are irreversible and will result in a loss of the original template.
      Note: Invite templates can also be created and managed from your Communication Center. From the **Main Menu**, click **Communication Templates**. Then, on the left of the screen, click **Invite** in the dropdown menu.
   b. If you have no existing templates or wish to create a new template, click **Create New Template** and continue below.
8. Select one of the provided template types by clicking its **check mark(✓)**. The Add/Edit Template page will open.
9. To name this template, click the **edit button** at the top of the screen.
10. Enter a Code (a unique identifier to distinguish templates with the same name), Name, and Sub Category, if desired. Click **Save**.
11. The invite template is displayed on the left of the screen and is already populated with default content.
    a. Most invite templates include only text. For these templates, continue below.
    b. Some templates include additional content, such as images. For these templates, continue below and reference the Add Widgets, Edit Widgets, and Edit Layout sections of the Create a Communication Template tutorial for help working with other content types, styles, and layout.
12. To edit the text, hover over it and click the **edit icon** in its toolbar. An edit menu will appear at the right of the screen.
13. Enter and format the text to appear in the text box. Use placeholders to auto-populate the text with information specific to each recipient. When done, click **Close**.
14. Content is added to templates in the form of widgets. If you wish to add an additional text box to the template, click **Widgets** at the right of the screen to access the widget menu. To add a widget to the template, **click and drag the widget type** to the body of the template on the left.
15. After a widget is added to the template, an edit menu will appear at the right of the screen. Repeat step 13 above to edit the text.
16. Continue adding widgets to the template as desired.
17. To delete a widget: Hover over it and click the **trashcan icon** in its toolbar.
18. To copy a widget: Hover over it and click the **copy icon** in its toolbar.

19. To change the order of the widgets: **Click and hold the toolbar** at the top of a widget, drag to the desired location, and release.

20. When you are done creating this template, click **Save**. You will be returned to the invite Setup page.

21. To preview or test this communication before sending it to your recipients, check the **Send Test Email** box and enter an email address. Then, access that email address for a preview.
    Note: Placeholders within the template may not be filled in for test emails.

22. When done, click **Save And Next**.

23. The "Select Invites" page will open, allowing you to create the recipient list for this invite.
    Note: While the steps below demonstrate how to add a student as a recipient, you may also add a team.

24. To add an individual student: In the "Choose Student or Team" field, type the name of the desired student or team.
    a. If the student exists in the system, their name will appear. Click on the student's name, then click the **add icon**.
    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**. When the window closes, click the **add icon** next to the student's name.

25. To add multiple students: Click **Advanced Search**. Follow steps 1-8 from the Select Recipients section of the Send Advanced Communication tutorial. When done, click **Add to List**.

26. To delete a recipient from the invite list, click **Delete** next to the desired name, then click **OK**.

27. When done creating your recipient list, click **Next**.

28. The "Send" page will open. To send the invite now, check the **Send Now** box. To send the invite at a later date, check the **Send On** box, then select the date and time you wish to send the invite.

29. When done, click **Save**.

Manage Invites

After creating and sending an invite, you can track the activity of its recipients, such as whether they have opened, accepted, or declined the invite. You can also use this section to complete drafts or make copies of invites.

1. From the **Main Menu**, click **Our Opportunities**. Alternatively, click **Active Opportunities** in the Dashboard.

2. Click on **the name of the opportunity** for which you have sent an invite.

3. On the left of the screen, click **Invites**.

4. The "Invites" page will open, displaying details and analytics about past and current invites.

5. To view incomplete invites: Click the **Draft** tab.
    a. To edit or complete an invite: Click **Edit**.
    b. To delete an invite: Click **Delete**, then click **OK**.

6. To view completed invites: Click the **Processing** tab.

a. To view details for an invite: Click **View**. A list of analytics, including open, click, and attendance rates, will appear; you may click on each item to see more detail. A list of each recipient and their individual activity will also appear.

b. To copy an invite: Click **Copy** in its dropdown menu. Be sure to create a new subject name if you wish to distinguish it from the original.

👍 This is a helpful shortcut when you wish to use an existing invite as the base for a new invite. Doing so allows you to utilize the original invite's recipient list and settings.

Note: The copied invite utilizes the same recipient list as the original invite. While you cannot delete any existing recipients, you can add recipients by following steps 22-27 of the Create an Invite tutorial above.

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 right of the screen. Alternatively, from the **Main Menu**, click **Communication Center**.
   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 a newsletter: Click **Edit** next to the desired newsletter. Follow the Send Advanced Communication tutorial to edit.
8. To edit or complete an email: Click **Edit** next to the desired email. Follow the Send Basic Communication to Students tutorial to edit.

View Newsletters

While newsletters appear in your list of outgoing communication, you can also access a list of communication that contains only newsletters.

1. From the **Main Menu**, click **Communications** then **History**.
2. A list of all saved and sent newsletters will appear. "In Process" indicates a newsletter that is currently being processed. "Completed" indicates a newsletter that has been successfully sent. "Saved Only" indicates a newsletter that has been saved but not sent.
3. To copy a newsletter: Click **Copy** in its dropdown menu.

   👍 This is a helpful shortcut when you wish to use an existing newsletter as the base for a new newsletter. Doing so allows you to utilize the newsletter's recipient list and settings.
   a. The "Setup Newsletter" page will open.
   b. To save and send the copy later: Enter a new Subject to distinguish this piece of communication, then click **Save**. The copy will appear in your Newsletter List.
   c. To edit and send the copy now: Refer to the Send Advanced Communication tutorial for help composing and sending the copied newsletter, skipping sections that you do not wish to alter (e.g. "Select Recipients").
      Note: **When editing the copied newsletter, edits made to the template are irreversible and will result in a loss of the original template.** If you do not want to lose this template, you can create a new template/newsletter by completing the Create a Communication Template and/or Populate a Communication Template tutorials**.**
4. To edit and/or send a saved newsletter: Click **Edit** next to the desired newsletter. Refer to the Send Advanced Communication tutorial for help editing and/or sending the newsletter.
5. To review a sent newsletter: Click **View Summary** in its dropdown menu. Refer to the View Outgoing Communication tutorial above for help navigating the summary page.
6. To delete a newsletter: Click **Delete** in its dropdown menu, then click **OK**.

Managing Student Coordinators

To facilitate the management of your Fundly Connect™ account, your university can create and assign student coordinators. A student coordinator is assigned to an opportunity to help manage its students. While student coordinators can log and verify hours, schedule, and communicate with students, they cannot modify the account settings or configurations of the organization.

Assign a Student Coordinator to an Opportunity

If the individual you would like to assign as a student coordinator already has a student account with Fundly Connect™, follow the steps below.

1. From the **Main Menu**, click **Students** then **Volunteer Coordinators**.
2. At the top right corner of the screen, click **Assign Coordinator**.
3. Select the Opportunity and Venue you wish to assign the student coordinator to manage.
4. To assign a student, set the slider to **Student**. Then, type the name of the individual you wish to assign in the "Choose Student" field and click on their name when it appears.
5. To assign a user, set the slider to **User**. Then, select the user you wish to assign in the "Select User" field.
6. Click **Assign**.

Create a Student Coordinator Account

If the individual you would like to assign as a student coordinator does not have a Fundly Connect™ account, follow the steps below.

1. From the **Main Menu**, click **Students** then **Volunteer Coordinators**.
2. At the bottom right corner of the screen, click **Create New Coordinator**.
3. Create a Username, enter the coordinator's First and Last Name, and enter the coordinator's Email address. An email with a password will be sent to this email address to allow the student coordinator to log in to the account.
4. Click **Save**.
5. Once the account it created, you may assign this student coordinator to an opportunity by following the steps above in Assign a Student Coordinator to an Opportunity.

Remove an Existing Student Coordinator

1. From the **Main Menu**, click **Students** then **Volunteer Coordinators**.
2. Find the student coordinator you wish to remove.
   Note: To sort coordinators by opportunity, click the **Opportunity View for Student Coordinators** tab.
3. Under the coordinator's name, find the opportunity from which you wish to remove the coordinator.
4. Next to the opportunity, click **Remove** in the dropdown menu.

Substitute an Existing Student Coordinator

1. From the **Main Menu**, click **Students** then **Volunteer Coordinators**.
2. Find the student coordinator you wish to substitute.

Note: To sort coordinators by opportunity, click the **Opportunity View for Student Coordinators** tab.

3. Under the coordinator's name, find the opportunity from which you wish to remove the coordinator.
4. To substitute with a student, set the slider to **Student**. Then, type the name of the individual you wish to assign in the "Choose Student" field and click on their name when it appears.
5. To substitute with a user, set the slider to **User**. Then, select the user you wish to assign in the "Select User" field.
6. Click **Substitute** to make the change.

Application Forms

Your university may require that students fill out an application form when they apply to an opportunity. Application forms can be added to opportunities when they are created, or added later by editing the opportunity. To create specialized fields to add to your forms, follow the Custom Datasets section of the Configurations tutorial before proceeding.

Create an Application Form

1. From the **Main Menu**, click **Opportunities** then **Design Application Form**.
2. At the bottom right corner of the screen, click **Add New Form**.
3. In the "Student Application Form" screen, create a name for the form.
4. In the "Add Field" dropdown menu, click on a field to add it to your form. Add fields in the order that you wish for them to appear.
5. To edit a field: Click the **edit icon**. Here, you may change the field's label, make it a required section, and give users further guidelines or instructions.
6. To delete a field: Click the **remove icon**.
7. When finished designing the form, click **Save**.

Manage Application Forms

1. From the **Main Menu**, click **Opportunities** then **Design Application Form**.
2. To delete an application form: Click **Delete** in its dropdown menu, then click **OK**.
3. To edit an application form: Click **Edit**. Follow steps 3-7 from the Create an Application Form tutorial above to edit.
4. To copy an application form: Click **Copy** in its dropdown menu. Create a new name, if desired, then click **Proceed**.

Training Sessions

If your university requires students to attend orientation or training sessions, you can use your Fundly Connect™ account to organize these sessions.

👍 Orientation and training sessions can be used directly by partner organizations for students of their own opportunities. However, universities may also use these sessions for students of their own opportunities or as a service to partner organizations.

Create a Training Session

You must first create your orientation or training session on Fundly Connect™. Then, refer to the Create a Basic Opportunity tutorial to learn how to add it as a requirement for your opportunity. Fundly does not distinguish between training and orientation sessions, so follow the steps below for both.

1. From the **Main Menu**, click **Opportunities** then **Orientations & Trainings**.
2. At the bottom right corner of the screen, click **Add Training**.
3. Keep the slider at the top of the screen set to **Active**.
4. Enter the name of the training session and its maximum capacity.
5. If you want to allow students to cancel their session, set the **Allow RSVP...** slider to "Yes."
   Note: This feature is best for orientation sessions for which an exact count is not necessary (e.g., large orientation sessions).

6. If the training session will not take place at the address listed, click **Edit**. Enter a Title and Address (click **Can't find your location?** if address fields do not appear), then click **Save**. Or, if the session will be offered at multiple locations, click **Add Location**, enter a Title and Address, then click **Save**.
7. Enter Training Details for the session. Include details about what information will be covered and why students must attend.
8. Click **Save & Next**.
9. In the "Schedule for" dropdown, select the location to which this schedule applies.
10. 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 dates
    e. **Other:** Untraditional schedules occurring on random dates
11. Set a date(s) or date range.
12. If applicable, select the days of the week and/or days of the month when this schedule will occur.
13. Under "Date Exceptions," enter any dates or date ranges during which this schedule does not apply, then click the **add icon**.
14. To complete this schedule, click **Save**.

15. The "Add/Edit Shift" window will open, allowing you to set a shift (i.e., start and end time) for this session.
    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 students can attend the session based on their own availability, leave Start and End Times blank and activate the **Flexible Time** slider.
    d. 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.
        12. Set a second shift when you would like to offer the same training session twice in one day, set different shift times for different days of the week, etc.
16. To set an additional schedule, repeat steps 9-15 above.
17. 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**.
18. To delete a schedule: Click **Delete** in its dropdown menu, then click **OK**.
19. When done setting schedules, click **Save**, then click **Next**.

Assign a Student to a Training Session

While students will be prompted to schedule themselves for required training sessions when applying for an opportunity, you can also manually assign students to training sessions. This tool is helpful if you want to assign current students to additional training, assign individual students to specialized training based on job function, etc.

Note: A university cannot manage the training sessions of its partner organizations. However, a university can assign a student to a partner organization's training session if a "Pending Orientation & Training" status appears for the student on the opportunity's "Manage Student" page. To assign the student, click on **Pending Orientation & Training** and follow steps 3 and 5 below.

1. From the **Main Menu**, click **Opportunities** then **Orientations & Trainings**.
2. Next to the desired training name, click **Add RSVP** in the dropdown menu. Alternatively, click **Calendar View**, locate the desired session, click the **add icon** next to "RSVPs," and proceed to step 4.
3. Select the Location, Shift, and Date of the session.
4. Select the student (s) you want to assign to this training session. Use the search field if desired.
5. Click **Save**.

Mark Attendance for a Training Session

You must manually mark a student's attendance to an orientation or training session.

👍 Fundly Connect™ does not allow students to schedule or log hours until they have been marked as attended for all scheduled training. Complete this step as soon as possible after a scheduled training session to allow students to begin scheduling.

Note: A university cannot manage the training sessions of its partner organizations. However, a university can mark a student's attendance for a partner organization's training session if a "Pending Attendance" status appears for the student on the opportunity's "Manage Student" page. To mark attendance for the student, click on **Pending Attendance** and follow steps 4-5 below.

1. From the **Main Menu**, click **Opportunities** then **Orientations & Trainings**.
2. Next to the desired training name, click **View RSVP** in the dropdown menu. Alternatively, click **Calendar View**, locate the desired session, click **the number** that appears next to "RSVPs", and proceed to step 4.
3. Select the Location, Shift, and Date of the session. A list of all attendees for the selected session will appear.
4. To mark a student as having attended the session, set the slider under the "Attended" column to "Yes."
5. When done, click **Save**.

View Attendees for a Training Session

1. From the **Main Menu**, click **Opportunities** then **Orientations & Trainings**.
2. Next to the desired training name, click **View RSVP** in the dropdown menu. Alternatively, click **Calendar View**, locate the desired session, click **the number** that appears next to "RSVPs", and proceed to step 4.
3. Select the Location, Shift, and Date of the session. A list of all attendees for the selected session will appear.
4. To remove a student from the session, click the **remove icon** next to the student's name, then click **OK**.
5. When done, click **Save**.

Delete a Training Session

1. From the **Main Menu**, click **Orientations & Trainings**.
2. Next to the desired training session, click **Delete** in the dropdown menu, then click **OK**.

Create Reports

Universities can create reports that pull information from their Fundly Connect™ accounts.

👍 You can find shortcuts for creating certain report types throughout the Fundly Connect™ site wherever you see an "Export" button. For example, to create a student report, follow step 3 of the <u>View all Students of an Opportunity</u> tutorial or step 4 of the <u>Search for Students</u> tutorial.

Default Reports

Default reports are most convenient due to their predefined settings. They are available in categories such as opportunities, organizations, programs, trainings, students and university.

Set Filters

1. From the **Main Menu**, click **Reports** then **Default Reports**.
2. On the left of the screen, a list of report options appears. Click the desired report type.
3. A list of further refined report types will appear. Click the **information icon** for a description of the report.
4. Click **Execute** next to the desired report.
    Note: Each report has a default format; to execute the report in a different format, select the desired format from the dropdown menu.
5. For some reports, a "Report Filters" window will open. This allows you to apply filters to the data included in the report if you do not want to see all data available. If the report opens instead, proceed to step 11.
    Note: To learn what each icon or field does, hover over it (not all icons and fields offer this feature).
6. On the left is a list of filter fields. Use the dropdown menu to view different categories of filters. To apply one to your report, click on **the filter name** to highlight, then click **Add**.
7. On the right is the list of all filter fields to be included in your report. To rearrange the order of the fields, click the **up and down arrows**. To remove a field, click the **X icon**.
8. To set the operator for a filter, click on **the filter name** to highlight it. In the dropdown menu at the bottom of the window, select an operator. Fill in a value to complete the operator (i.e., enter a number, set date(s), select dropdown items). Different filters will use different operators and values, depending on the type of data stored in the respective field.
9. If desired, check the **Group With Next Filter** box and select either "AND…" or "OR…" from the dropdown menu.
10. To run the report, click **OK**.
11. Save your report to your computer. The process of saving reports differs based on the execution format chosen.

Schedule a Report

Fundly Connect™ gives users the ability to schedule reports to run at another time. This tool is helpful if you wish to automatically run reports on a set schedule, or if you wish to schedule reports that take a long time to process to run at a more convenient time.

1. Follow steps 1-3 from the Set Filters tutorial above.
2. Click **Schedule** in the dropdown menu of the desired report.
3. Enter a Schedule Name.
4. Select an Export Type. If available for the chosen export type, you can password protect your report by entering a Password. This feature is useful for reports that contain confidential information (e.g., social security numbers, financial information).

5. To run the report now, check the **Execute Immediately** box.
6. To set a schedule for the report, set the time when you wish to run the report next to "Schedule Time." To run the report multiple times on the same day, check the **Repeat Every...** box and set a frequency.
7. Set how often you wish to run the report under "Recurrence Pattern."
8. Set the date range during which you wish to run the report under "Range of Recurrence."
   Note: To cancel a schedule, you must contact the support team at Fundly Connect™. For this reason, it is recommended that you set an end date or end point for all schedules.
9. Click **Next**.
10. Follow steps 6-9 from the Set Filters tutorial above to set filters. Click **Next**.
11. All scheduled reports will be received via email. On the "Recipients" page, enter the email address(es) where you wish to receive the report. Edit the subject and body of the email, if desired.
12. When done, click **Finish**.

Copy a Report

Fundly Connect™ gives users the ability to copy reports. This tool is helpful if you like a particular default report but wish to edit it to better fit your needs. All copied reports become custom reports.

1. Follow steps 1-3 from the Set Filters tutorial above.
2. Click **Copy** in the report's dropdown menu.
3. Enter a new name for the report and click **Copy**.
4. A new page will open showing the copied report. To access the report in the future, go to the **Main Menu** and click **Custom Reports**.

Custom Reports

Custom reports are an advanced tool not covered in this guide. However, when a default report is copied, it appears in your custom reports. Follow the steps below to access and edit a copied report.

1. From the **Main Menu**, click **Reports** then **Custom Reports**.
2. Use the Set Filters tutorial above for help editing or customizing the report.

The four types of custom reports are explained below.

1. **Express:** Simple reports for basic lists, etc. that do not require editing or formatting
2. **Standard:** Reports that have the ability to be edited and formatted with formulas (most default reports are standard reports)
3. **Cross Tab:** Reports that are used to compare information appearing in rows and columns
4. **Dashboard:** Reports that allow you to create a dashboard

Connect - CRM Sync

Every contact record starts with the contact / volunteer / organization / business being entered into Connect and then the system matching to a record in the CRM (or creating a new record if it can't find a match). After the records match, the information will sync two-way.

◆ A Fundly CRM™ account includes many of the same features and perks of a Fundly Connect™ account, but with additional tools to manage pledges, grants, donors, members, and events, it will help your university reach more donors, raise more funds, sell more memberships, and track more interactions and tasks.

◆ Fundly CRM™ is a separate subscription from Fundly Connect™.

Enabling Sync

1. From the **Main Menu,** click **System Configurations** then **System Sync**.
2. To enable the sync, activate the **Enable Sync** slider for the category.

Log out of your Fundly Connect™ Account

1. From the Dashboard, click on the **account menu** at the top of the screen.
2. Click **Log Out**.