

**Volunteer**Easy

## VolunteerEasy NonProfit User Guide for Organizations

This is the complete user guide for nonprofit organizations.

Not sure where to start? Below are the top 6 topics for you. Click on the topic name to jump to the page.

- [Customize your Organization Account](#)  
This section will help you complete your account setup, account information and profile.
- [Setup Configurations](#)  
Here, you will learn to set up your configurations such as email notifications. It is important that you set this up correctly before you start entering your data.
- [Design your Public Site](#)   
Having your own public site is a benefit of upgrading your plan. You will be able to change the look and feel of your public site and it is where your opportunities are published and where volunteers can sign up and apply online.
- [Create your Opportunities](#)  
This section will guide you in creating your opportunities and schedules. You will have the option to publish these opportunities online.
- [Manage Volunteer Profiles](#)  
Learn how to add, edit, deactivate and remove volunteer profiles.
- [Manage Volunteers for an Opportunity](#)  
You will learn how to assign a volunteer, approve or reject volunteer applications, schedule a volunteer, log hours for a volunteer, and a lot more.

Read on the **Table of Contents** if you are looking for specific topics.

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- ◆ Look for the “👉” symbol for best practices and tips.
- ◆ Features with the “🍷” symbol are not available to basic plans.

# About VolunteerEasy

## VolunteerEasy

VolunteerEasy, powered by NonProfitEasy™, is an online portal connecting non-profits with their volunteers and was created out of a desire to help non-profits more effectively and efficiently manage these relationships. With a VolunteerEasy account, volunteers gain access to a real-time database of opportunities offered by local non-profits such as yours, and you gain access to the communication, application, and scheduling tools needed to manage these volunteers.

Your feedback and comments are most welcomed and highly encouraged. You can email your suggestions to [support@fundly.com](mailto:support@fundly.com).

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User Guide technical writing content and design by Laura Mitchell.

Editing by Fundly, Inc. [www.fundly.com](http://www.fundly.com).

## Getting Started

### Create an Account on our Volunteer Management Solution

In order to post opportunities online, non-profit organizations must first create an account on our volunteer management database.

1. Go to <https://www.volunteereasy.com/>.
2. Click **Pricing** from the top right menu. Under the Non-Profits tab, choose your plan and click **Sign Up** found at the bottom of that plan.  
*Note:* If you are associated with a Volunteer Action Center (VAC) or University, sign up directly through the VAC or University site. The steps below may vary slightly for each VAC or University.
3. Under “Create new Account,” enter your organization’s name or EIN.
4. Under “Basic Info.,” enter your organization’s EIN and enter a username and password, which will become your login to the database.
5. Enter your Organization Details, Address Details, and a Primary Contact. Click **Next**.
6. Select your organization’s Causes. Click **Next**.
7. If you are signing up under a VAC or University, indicate if your organization is associated with any of its programs, then click **Next**. Proceed to step 13 below.
8. Finalize your subscription plan. Choose to renew either “monthly” or “annually” then click **Select** of your desired subscription plan. Enter the Promo/Coupon code, if there’s any. Click **Next**.
9. Review your subscription plan and contract details. Select the check box for the contract and enter your full name on each of the blank name fields. Click **Next**.  
*Note:* To review your contract in the future, login to your account and click on the dropdown next to your Username then click **My account**. Click **My Account** on the left hand panel then click **Download** next “Contract”.
10. Enter your credit card information and billing address.
11. Enter your desired site URL.  
*Note:* If your organization desires more customization, we also offer a Vanity URL add-on which can serve as a powerful marketing tool for an organization to promote its brand to partners and volunteers.
12. Select the check box to accept the terms & conditions and privacy policy.
13. Click **Register**. You will receive a confirmation email containing your account and login information.

### Log in to your Account

1. Bookmark your organization’s public site that was generated when you created your account (i.e. [www.volunteereasy.com/site/organizationname](http://www.volunteereasy.com/site/organizationname)).  
*Note:* This may vary if you are associated with VAC or University. You can also login to your account from our home page at [www.volunteereasy.com](http://www.volunteereasy.com) by clicking on **Sign In**.
2. Click on **Organization Login**.
3. Enter your username and password, then click **Login**.

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### Navigate

#### The Dashboard

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

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

In the Dashboard, you will see the following:

##### Active Volunteers

- Number of active volunteers associated with your organization in the database

##### Active Teams

- Number of active teams associated with your organization in the database

##### Active Opportunities

- Number of active opportunities your organization has posted in the database

##### Summary of Scheduled Volunteer(s)

- Details about your volunteers and their total hours contributed

#### The Main Menu

To access other areas of your account, use the Main Menu. To access it, click the **Main Menu** icon (see [Key Guide](#)) at the top left.

In the Main Menu, you will see the following:

Icon	Icon Name	Function
	Add New	Add opportunities, volunteers, volunteer coordinators and hours
	Recent	See list of recent pages you have visited in the system
	Dashboard	Return to the Dashboard
	Communication	Communicate with volunteers, view communication history, and create or manage communication templates
	Opportunity	View your own opportunities, design application forms, setup orientations & trainings
	Volunteers	Add, search for, assign, and schedule volunteers; create or assign volunteer coordinators
	System Configurations	Personalize your account by setting preferences
	Website Integration 	Configure your public site
	Reports	Create reports from the information in your database

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### Key Guide

The following icons appear throughout the system.

*Note:* In some cases, the 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
	Slider	Turns a feature on (green) or off (gray)
	Envelope	Opens email and communication tools
	Copy	Creates a duplicate
	Edit	Opens edit page or window
	Trashcan	Deletes a page or item
	Remove	Removes a page or item
	Add	Adds a page or item
	Return	Returns user to previous page
	Information	Provides a description
	Search/View	Conduct a search / View details
	My Account	View/Edit your account and organizations details
	Theme	Select your account's color scheme
	Support	Redirects to our support library/Tutorials
	My Profile	View/Edit your account profile
	Log Out	Logs user out of the account

### My Account Key guide

Icon	Icon Name	Function
	Organization	Edit or view your Organization details
	My Account	View and manage contract and subscriptions/add ons
	Credentials	Update your username and/or password
	Users	Manage users of the account
	Application Roles	Configure the different user roles

# Customize your Account

## Account Settings

For all account settings, click the dropdown next to your username found at the top right of the screen then click **My Account**.

### Organization Information

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



Don't forget to add your organization logo as it will appear online and on the email notifications.

### Change your Subscription

For a monthly or yearly rate, organizations can choose to upgrade their accounts to increase the volunteer capacity and gain access to additional features. To view all the benefits of upgrading, visit VolunteerEasy's pricing page at <https://www.volunteereasy.com/Pricing/>.

1. Click **My Account** on the left hand Panel.
2. To upgrade your account or change your subscription, click **Renew My Subscription**.
3. Review the subscription plans. Select for your desired subscription then click **Continue**.
4. Click **Monthly** or **Yearly** for the payment term. Enter the Promo/Discount code, if there's any. Click **Finalize Your Plan**.
5. Complete the Terms and Conditions. Click **Accept Terms & Conditions**.
6. Review and click on **Complete your Order**.

*Note:* You can also change the card details before completing the order.

### Purchase Add-Ons

Organizations have the option to purchase add-ons that offer extra functionality.

1. Click **My Account** on the left hand panel.
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.

### Update Credit Card Information

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

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### Generate Account Statement

An account statement provides a summary of your organization's purchases and payments during a designated date range. They are only relevant to organizations that have upgraded their account or purchased add-ons.



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

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

### Change Username or Password

1. Click **Credentials** on the left hand panel.
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 an organization's account. Multiple users can be logged in simultaneously.

*Note:* Organizations associated with a VAC or University can only have one user.

1. Click **Users** on the left hand panel.
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, organizations can create and define different application roles.

1. Click **Application Roles** on the left hand panel.
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

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Management” (create and edit users), and “Role Management” (create and define application roles).

5. Click the **VolunteerEasy 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 organization, click **Edit**.

## My Profile

You may supplement or edit the information provided when you created an account for your organization or its users by completing each profile.

### Organization Profile

1. From the Dashboard, click the dropdown next to your username. Then, click **My Profile**.
2. In the **Organization Profile** tab, make any desired edits to your organization’s name, address, type, email address, phone number, mission statement, primary contact, or causes.
3. When done, click **Save**.

### User Profile

1. Click the dropdown next to your username then click **My Profile**.
2. Make any desired edits to the user’s name or email address.
3. To add an Email Signature, enter the signature in the text box. If desired, you can use the formatting options available.
4. When done, click **Save**.

# Configurations

To customize your organization account, you may set and add additional preferences with the Configurations page. If your organization involves activity types, age groups, causes, populations, or skills that are not included in the options provided by the system, you can add them here and they will appear as options when creating an opportunity, or as a filter for volunteer searches. Preferences for topics such as agreements, custom datasets, notifications, and social sharing are also set here.

## System Configurations

### Agreements

Organizations have the option to require volunteers sign an agreement upon sign-up or when applying for an opportunity.

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

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3. To create an agreement, at the bottom right corner of the 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 volunteer sign-up, next to “Applies to”, select the “Volunteer” checkbox. If the agreement is for teams, select the “Team” checkbox.
7. 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.
8. 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.
9. When done, click **Save**.
10. To edit an agreement: Access your agreements and click **Edit** next to the desired agreement. Follow steps 4-9 above to make edits.
11. To delete an agreement: Access your agreements and click **Delete** in the dropdown menu of the desired agreement.

### Custom Datasets

Custom datasets allow organizations to add customized fields during processes such as creating an application form. While the system provides basic prefabricated fields such as name, address, and gender, this feature allows your organization to add custom datasets requesting unique information about a volunteer, such as education, employment status, or vaccination history.



- If your organization requires volunteers to fill out an application form, you can use the custom dataset feature to digitally reproduce the form on the database.
1. From the **Main Menu**, click **System Configuration**.
  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 applicable on volunteer sign-up, select the “Volunteer” check box.
  6. If the dataset is applicable on team sign-up, select the “Team” check box.
  7. If the dataset is applicable to volunteers applying to an opportunity, select the “Opportunity” check box.  
*Note:* This dataset will not automatically appear when a volunteer or team 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.

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- 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. **Yes/No/NA:** Select from “Yes”, “No” and “NA” radio buttons
  - f. **Yes or No with Agree:** Select from “Yes” and “No” with agree buttons
  - g. **Phone:** Enter phone number
  - h. **Email:** Enter email address
  - i. **Url:** Enter url
  - j. **Date:** Select date from a calendar
  - k. **Date & Time:** Select date and time from a calendar
  - l. **Dropdown (single choice):** Select one of multiple choices in a dropdown format
  - m. **Radio Button (single choice):** Select one of multiple choices in a radio button format
  - n. **Checkbox (multiple choice):** Select multiple choices by checking boxes
  - o. **Picture:** Upload a picture from computer
  - p. **Document:** Upload a document from computer
  - q. **Accept or Decline:** Select from “Accept” and “Decline” buttons
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 volunteers.
  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 4-16 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**.

### 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.

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### VolunteerEasy/CRM Sync

Organizations that have both VolunteerEasy and CRM accounts can choose to sync the information in these accounts. This process will sync information about volunteers, such as name, primary email address, mailing address, and primary phone number.

👍 It is recommended that an organization sync these accounts as soon as possible, as it will ensure that all updates made by volunteers to their VolunteerEasy accounts will also appear in the organization's CRM account.

1. From the **Main Menu**, click **System Configurations**.
2. Click **System Sync**.
3. To sync your volunteer data from VolunteerEasy account to your CRM account, activate the **Enable Volunteers Sync** slider.
4. Click **Save**.

For more information on the sync process, read the [VolunteerEasy/CRM sync](#) tutorial.

### Email Notifications

The system sends automated email notifications when certain actions occur in association with your organization's account. Some notifications are sent to volunteers, and some notifications are sent to your own organization.

👍 Customizing your email notifications is a good way to communicate the next steps to your volunteers.

1. From the **Main Menu**, click **System Configuration**.
2. Under Notifications, if you wish to view or edit email notifications for Volunteers, click **Volunteer**.  
If you wish to view or edit email notifications for Organizations, click **Organization**.  
If you wish to view or edit email notifications for Volunteers, click **Volunteer**.  
If you wish to view or edit all email notifications, click **View All**.
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 organization 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 organization. If entering multiple email addresses, separate them with a comma and a space.

👍 For notifications sent to your own organization, use this feature when you wish to receive the notification at an additional email address. For notifications sent to

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volunteers, 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**.

## Opportunity Configuration

### Activity Type

“Activity Types” refer to the activities that an organization and its volunteers take part in to support its cause.

1. From the **Main Menu**, click **Opportunities**.
2. Under Configurations, 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**.
6. To hide an activity type from your public site, uncheck the option to “Display on Public Site” and click **OK** on the confirmation pop-up.

### Age Groups Required

“Age Groups Required” refers to the desired age of volunteers working with an organization.

1. From the **Main Menu**, click **Opportunities**.
2. Under Configurations, 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**.
6. To hide an age group from your public site, uncheck the option to “Display on Public Site” and click **OK** on the confirmation pop-up.

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### Age Groups Served

“Age Groups Served” refers to the age of the individuals whom an organization serves.

1. From the **Main Menu**, click **Opportunities**.
2. Under Configurations, 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**.
6. To hide an age group served from your public site, uncheck the option to “Display on Public Site” and click **OK** on the confirmation pop-up.

### Causes

“Causes” refer to the causes that define the mission of an organization.

1. From the **Main Menu**, click **Opportunities**.
2. Under Configurations, 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**.
6. To hide a cause from your public site, uncheck the option to “Display on Public Site” and click **OK** on the confirmation pop-up.

### Populations Served

“Populations Served” refers to categories that classify the population that an organization serves.

1. From the **Main Menu**, click **Opportunities**.
2. Under Configurations, 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**.
6. To hide a population type from your public site, uncheck the option to “Display on Public Site” and click **OK** on the confirmation pop-up.

### Preferred Locations

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

1. From the **Main Menu**, click **Opportunities**.
2. Under Configurations, click **Preferred Locations**.
3. At the bottom right corner of the screen, click **Add Location**.

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4. Enter a Title and the exact address, then click **Save**.
5. To edit a preferred location: Click **Edit**. Make the desired change, then click **Save**.
6. To delete a preferred location: Click **Delete** in its dropdown menu, then click **OK**.
7. To inactivate a location, uncheck the active “Status” and click **OK** on the confirmation pop-up.

### Social Sharing

Your organization and its volunteers have the option to share content on personal social media accounts. You can customize the default message that appears when this content is shared, but note that organizations and volunteers have the ability to further edit these messages at the time of posting. Content will only be shared if your organization or your volunteers choose to do so.

1. From the **Main Menu**, click **Opportunities**.
2. Under Configurations, click **Social Sharing**.
3. In the “Message when publishing opportunity field,” add the message you would like to appear when your organization shares that it published an opportunity. When done, click **Save**.
4. In the “Message when volunteer applies to an opportunity” field, add the message you would like to appear when volunteers share that they applied to an opportunity. When done, click **Save**.

### Notification Settings

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

*Note:* Each opportunity can have different notification settings. Opportunity level notification settings precedes Organization Level notifications settings.

1. From the **Main Menu**, click **Opportunity**.
2. Under Settings, click **Opportunity Notification**.
3. Under “Reminder Notification,” you can customize notifications designed to remind volunteers and opportunity owners of upcoming opportunities.
  - a. To set when a reminder notification is sent, enter a number in the “Days Before Volunteering 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 **Volunteer** 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 Volunteering Date” box provided.
  - e. To set a reminder notification to be sent on the day an opportunity occurs, complete the “On Volunteering Day” box.

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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 Volunteering Date” box.
  - b. Check the **Volunteer** 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 volunteers. 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 organization. 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 organization.  
*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.

## Volunteer Configurations

### Ethnicities

“Ethnicities” can be configured and tracked on volunteers.

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

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2. Under Configurations, click **Ethnicities**.
3. Under “Code,” enter a code for ethnicity (for example ASI for Asians).
4. Under “Description,” describe the ethnicity.
5. Click **Add** to add the ethnicity.
6. To edit an ethnicity: Click **Edit**. Make the desired change, then click **Save**.
7. To delete an ethnicity: Click **Delete** in its dropdown menu, then click **OK**.
8. To hide an ethnicity from your public site, uncheck the option to “Display on Public Site” and click **OK** on the confirmation pop-up.

### Skills

“Skills” refer to the skills that an organization and its volunteers utilize to conduct its activities and support its cause.

1. From the **Main Menu**, click **Volunteers**.
2. Under Configurations, click **Skills**. A list of “parent” and “child” (i.e., sub-) skills will appear.
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**.
6. To hide a skill from your public site, uncheck the option to “Display on Public Site” and click **OK** on the confirmation pop-up.

### Tags

A tag is a flag that can be assigned to individual volunteers. This flag can be used to quickly identify a specific group of volunteers when conducting a search or creating a report. Tags are created here in your configurations and can be assigned to volunteers by following the [Assign Tags to Volunteers](#) tutorial.

1. From the **Main Menu**, click **Volunteers**.
2. Under Configurations, click **Tags**.
3. To add a tag: Type its name (e.g., “Staff”) in the “Name” field, then click **Add**.
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**.

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### Time Off

When a “Time Off” is scheduled for a volunteer, all opportunity schedules that fall within the “time off” dates are cancelled. Different “time off” types can be added under configurations. Time Off options are created here in your configurations and can be scheduled for volunteers by following the [Assign Tags to Volunteers](#) tutorial.

1. From the **Main Menu**, click **Volunteers**.
2. Under Configurations, 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**.

## Add an Association

### Associate with a Volunteer Action Center (VAC) or University

As an organization, you can associate your account with Volunteer Action Centers (VAC) and/or Universities. By following the [Create a VolunteerEasy Account](#) tutorial above, you were automatically associated with the VAC or University under which you created your account. If this is not the case, you can associate yourself here.



Associating with a VAC or University is helpful in promoting your opportunities to a larger audience.

1. From the Dashboard, click **My Associations** at top right of your screen. If your organization’s VAC or University does not appear, continue with the following steps.
2. Click **Add Association**.
3. Search for the name of your VAC or University.
4. Once found, click **Save And Associate**. Click **Close**. Before being finalized, the VAC or University will need to approve your association request.

### Associate with a Program

Once your organization is associated with a VAC or University, you can associate with any of their configured programs. This process allows your organization to post opportunities linked to specific programs or events organized or sponsored by the VAC or the University. While you may have associated your organization with programs when creating the account, you can add program associations by following the steps below.

1. From the Dashboard, click **My Associations** at top right of your screen.
2. Click **the name of the desired VAC or University**.
3. Under “Programs,” check the boxes next to any programs with which you wish to associate.

*Note:* Click the **search/view icon** to view a description of the program.

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4. If an agreement is required to participate in the program, it will appear below the program's name. Read the agreement, then sign in the field provided.
5. Click **Save**. Before being finalized, the VAC or University may need to approve your request.

# Create and Manage Opportunities

Organizations can create basic and advanced opportunities and post on their website or share with their VAC's or University's volunteers. After opportunities are created, organizations can manage them by making edits, managing applicants, and assigning volunteers.

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

## Create a Basic Opportunity

Basic Opportunities are simple opportunities for one time, ongoing and recurring events that do not include multiple locations.

To add a basic opportunity, begin in the Dashboard.

1. Click **Add New** in the Main Menu
2. Click **Add Opportunity**.

### Basic Information

1. At the top right, keep the slider set to **Active**.
2. Enter the Opportunity Name.
3. In the "Contact Person" dropdown menu, select the user who will be receiving the notifications for the opportunity. The drop down will display all the users of the organization account.  
For more details on managing users, see the ["Manage User List"](#) section of the [Account Settings](#) tutorial.
4. If this opportunity will not take place at a physical location, set the **Virtual Opportunity** slider to "Yes."
5. If this opportunity will not take place at the default address listed under "Address", click the **Edit** button. Enter the new address, then click **Save**.
6. Under "Position(s)," the opportunity will default to a single position called "Volunteer." To add more positions, click **Add Position**. Enter the new position name (e.g., cashier) and an estimated hourly value (e.g., \$10), if desired. Click **Save**.
  - 👉 Positions represent the different jobs a volunteer might perform within an opportunity. Use them to help you coordinate your volunteers by designating different tasks to different positions in the same opportunity.
7. Under "Opportunity Logo", upload a logo or icon for the opportunity. Click on **Click here or drop a file**. This logo will appear on the public site.

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8. If your account has a paid subscription, you will find a “Programs” field to where you can link the opportunity to a program.

For more details on managing programs, see the [Create and Manage Programs](#) tutorial.

9. Under “Describe more about the Opportunity”, enter a description of your opportunity.

This description will appear on the public site, exactly as entered.

👍 This description should be professional in nature, so be sure to use complete sentences and proper grammar. Try to mirror a job description on a job-posting site by including details about the activities in which volunteers will be involved.

👍 Add images and YouTube videos if available.

10. Click **Save & Next**.

### Scheduling and Slot

1. Click **Add Dates**.
2. On the Add Schedule Dates pop-up, select the scheduling type then, set the Start Date and End Date.

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. **Other:** Untraditional schedules occurring on random dates
3. Once the dates are added, they will populate the Date column of the table.
  4. Click Add Slots to setup the slot time(s) for these dates.
    - a. Enter a Slot Name.
    - b. If applicable, select the Slot Day(s) to which this schedule applies.
    - c. Set the Start and End Times. If volunteers can attend the opportunity based on their own availability, leave Start and End Times blank and activate the **Flexible Time** slider.
    - d. If applicable, select the Positions to which this shift applies and set the maximum capacity for each position, if desired.

*Note:* Once an opportunity reaches its capacity, volunteers will no longer be able to schedule.
    - e. If you are done, click **Save**.

5. Click **Next**.

### Settings

Depending on your account subscription, the options below may vary.

1. Select the Cause(s), Skill(s), and Activity Type(s) associated with this opportunity.

*Note:* If you cannot find a specific category and you want to add it as an option, you can create one under Configurations. For more details on opportunity configurations, see the [Opportunity Configuration](#) tutorial.
2. Under “Keywords,” enter keywords related to the opportunity to help potential volunteers locate it (e.g., animals, charity walk, and environment). To enter a keyword, type the word or phrase, then press the “enter” key on your keyboard.

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-  Enter as many keywords as possible. Keywords help you initiate the vetting process by attracting volunteers that truly match the opportunity.
- 3. Under “Appropriate for which type of volunteers,” select all age groups that are appropriate for this opportunity.
- 4. If volunteers may apply as a Group or Team, activate the **Groups/Teams are allowed to apply...** slider. If you require information about each individual member of a group or team, active the **Team Member(s)' information required...** slider.
- 5. If you wish to allow volunteers to manage their own schedule, activate the **Volunteer can schedule for this opportunity** slider.
- 6. If you have a paid subscription, you have the option to display your opportunity on your public calendar. Activate the **Display on your Public Calendar** slider.
- 7. If you wish to allow volunteers to select/change time for the opportunity, activate the **Volunteer can select/Change in time** slider.
  -  Use this if volunteers are allowed to change their start and end time within the slot duration. This means they may do a partial time and not complete the entire slot duration.
- 8. If you wish to allow volunteers to log their own hours, activate the **Volunteer can log hours for this opportunity** slider.

*Note:* Your organization must still verify all hours logged by volunteers.
- 9. If you wish to have a volunteer’s hours automatically logged when attendance is marked, keep the **Auto Log Hours When Marked as Attended** slider activated.
  -  The “Auto Log Hours” tool expedites the process of logging volunteers’ hours. Instead of manually entering the number of hours a volunteer has worked, the organizations can automatically log hours based on the length of a volunteer’s assigned shift or schedule.

*Note:* To log hours using the attendance tool, follow the [Log Hours Using the Attendance Tool](#) tutorial.
- 10. If you wish to review a volunteer’s application before they are allowed to volunteer for an opportunity, activate the **Approval required for volunteer application** slider.
  -  If your organization has a screening process for volunteers, activate the approval option.

*Note:* For opportunities created on behalf of your organization, “Approval Required” slider will not be available and volunteer applications are auto approved.
- 11. If a volunteer's background check is required, activate the **Background Check required for Volunteer** slider.
- 12. If a volunteer must attend an orientation or training session before they can be considered a volunteer, activate the **Orientation and/or training is required...** slider and select the desired training(s).

*Note:* These sessions must have been previously created in your account to be selected here. To create an orientation and training session, follow the [Create a Training Session](#) tutorial.

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13. If you wish to allow volunteers to cancel their schedule for the opportunity, activate the **Allow Volunteer(s) to cancel opportunity before** slider.
14. Next to **Allow Volunteer(s) To Cancel Opportunity Before**, you can restrict a volunteer's ability to cancel their schedule(s) for an opportunity by entering the number of hours of notice needed (i.e., entering "24" allows a volunteer to cancel their schedule up to 24 hours before it starts). If left blank, volunteers can cancel a schedule any time.
15. If you wish to allow Auto Check Out Type for the Time It add-on, activate the **Auto Check Out Type for Time It** slider. 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 volunteer.
  - a. **Shift End**: Log hours according to the scheduled end time for the opportunity
  - b. **Volunteer Schedule End Time**: Log hours according to the end time that the volunteer has scheduled
  - c. **After a set amount of time**: Log a specified number of hours for all volunteers who you check out for this opportunity
16. Click **Save & Next**.

### Volunteer Application Form

If you have a paid subscription, you will be able to create a Volunteer Application Form which requires volunteers to fill out an application form when applying for an opportunity.



- This is helpful when you need to track information that is specific to an opportunity.
1. If you wish to select an existing form, select the form name on the "Select Template" dropdown.  
*Note:* To create pre-existing application forms, see the [Create an Application Form](#) tutorial.
  2. If you wish to create a new form, select **New Template** on the "Select Template" dropdown then enter Template Name.
  3. To add fields, follow steps 4-7 from the [Create an Application Form](#) tutorial.  
*Note:* To add specialized fields, select **Custom Dataset** under the "Add Field" dropdown.  
To create custom datasets, follow the [Custom Datasets](#) tutorial.

### Preview

1. Select the "Publish Date" for when you want the opportunity to be published online.
2. To publish the opportunity to our home site, click **Publish**.  
*Note:* For subscriptions that include a public site, clicking on "Publish" will display the opportunity on their own public site.
  - a. If you wish to preview the opportunity page, click **Preview**
  - b. If you wish to display the Opportunity Widget Script which you can embed on your website, click **Embed Now**.
  - c. If you wish to copy the URL of the opportunity page to share, click **Copy Link**
  - d. If you wish to share the opportunity on social media, click **Share on Social Media**

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3. If you are associated with a VAC or University, you can click **Publish/Send for Approval** next to the desired VAC or University.

👉 In order for your opportunity to be visible to the VAC's or University's community of volunteers, you must complete this step.

*Note:* The VAC or University may need to approve your opportunity before it becomes visible to volunteers.

For the steps with screenshots, see the [Creating a Basic Opportunity](#) tutorial online.

## Create an Advanced Opportunity

Advanced opportunities are different from basic opportunities in that they can include multiple locations. To add an advanced opportunity, click the **add icon** in the Quick Menu, then click **Add Opportunity – Advanced**.

### Basic Information

1. Follow steps 1-8 from the “Basic Information” section of the [Create a Basic Opportunity](#) tutorial above.
2. If this opportunity will take place at multiple locations, click **Add Location** under “Location(s).” Enter a unique title and address for the location, then click **Save**.
3. To delete a location, click **Delete** in the dropdown menu.
4. Click **Save & Next**.

### Scheduling and Slot

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. Select the days of the week and/or days of the month when this schedule will occur.
5. Under “Exceptions or Cancellation dates,” 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 Slot” window will open, allowing you to set a Slot (i.e., start and end time) for this schedule.
  - a. Enter a Slot Name.
  - b. Select the Slot Day(s) to which this schedule applies.
  - c. Set the Start and End Times. If volunteers can attend the opportunity based on their own availability, leave Start and End Times blank and activate the **Flexible Time** slider.

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- d. Select the Positions to which this shift applies and set the maximum capacity for each position, if desired.

*Note:* Once an opportunity reaches its capacity, volunteers will no longer be able to schedule for the slot.

- 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 slots on the same day, set different slot 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 slot, click **View Slot** under the desired schedule. Click **Edit**, make desired changes, then click **Save**. To delete a slot, click **Delete** in its dropdown menu, then click **OK**.
11. When done setting schedules, click **Save**, then click **Next**.

### Settings 💎

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

### Volunteer Application Form 💎

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

### Preview 💎

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

## View Opportunities

1. From the **Main Menu**, click **Opportunities** then **Our Opportunities**.
2. A list of your organization’s active opportunities will appear. To view inactive opportunities, click on **Inactive** at the top of the screen.
3. To view filtered opportunities: Select a filter from the “Filter By” dropdown at the top of the screen. Complete the field, then click **Filter**.
4. To view opportunities in a calendar format: Click **Calendar View** at the top of the screen. Select the desired opportunity from the “Volunteer Opportunity” dropdown menu.  
*Note:* The calendar only displays one opportunity at a time.

## Edit Opportunities

1. From the **Main Menu**, click **Opportunities** then **Our Opportunities**.
2. To edit an opportunity: Click **Edit**.

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

## Approve, Reject, or Remove a Volunteer for an Opportunity

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

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

### Approve or Reject an Applicant

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

*Note:* There is no option to turn on "Approval required" for opportunities that are created by a VAC/University/Faculty/ on behalf of the organization and so volunteer applications are auto approved.

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

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

### Remove a Volunteer

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

1. From the **Main Menu**, click **Opportunities** then **Our Opportunities**.
2. Next to the desired opportunity, select **Manage Volunteers** from the dropdown menu. A list of all of the opportunity's volunteers will appear.

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3. Next to the appropriate volunteer, select **Remove Volunteer** in its dropdown menu, then click **OK**.
4. If you wish to remove multiple Volunteers, you can select the checkboxes next to their name and then click on **Selected Volunteers/Teams** at the bottom and select **Remove** from its dropdown menu.
  - 👉 If the applicant is not a match for your organization, follow up with a phone call or email to let them know.

## View all Volunteers of an Opportunity

1. From the **Main Menu**, click **Opportunities** then **Our Opportunities**.
2. Next to the desired opportunity, select **Manage Volunteers** from the dropdown menu. A list of all of the opportunity's volunteers will appear.
3. To generate an Excel spreadsheet containing the volunteers' names, contact information, and hours, click **All Search Result** at the bottom and select **Export** from its dropdown menu.
4. Follow your computer's prompts to open and save the file.

## Manually Assign a Volunteer to an Opportunity

Though volunteers typically apply for opportunities themselves, you can also assign them to an opportunity posted by your organization. You may also assign teams to an opportunity.

1. From the **Main Menu**, click **Opportunities** then **Our Opportunities**.
2. Next to the desired opportunity, click **Assign Volunteer** in the dropdown menu.
3. In the "Choose Volunteer or Team" field, type the name of the desired volunteer or team.

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

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

*Note:* If you want to assign multiple volunteers to an opportunity and to schedule them all at once, use the "Assign and Schedule Volunteers" tool.

## Assign and Schedule Volunteer Tool

Use this tutorial to assign multiple volunteers to an opportunity at the same time using the "Assign and Schedule Volunteer" tool. This method also allows you to create "configurations" for

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volunteer assignments, where you can preset details such as opportunity location, slot, and dates to use again for future quick assigns.

1. From the **Main Menu**, click **Opportunities** then **Assign and Schedule Volunteers**.
2. Select an Opportunity from the “Select Opportunity” dropdown menu.
3. If you have previously set up a configuration for this opportunity that you wish to use, click **Assign Volunteer** in the dropdown menu next to the configuration 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, Slot, 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 volunteers 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 volunteers.
  - a. Do not assign: Do not assign volunteer(s) to any dates
  - b. Proceed anyway: Assign volunteer(s) to all dates, regardless of full capacity
  - c. Add to available dates: Assign volunteer(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 Volunteer(s) that you wish to quick assign to the opportunity. Click anywhere on the screen to activate your selection.
12. Under “Assign Volunteer,” an entry space will appear for each volunteer you wish to assign.
13. The Location, Slot, Position, From Time, To Time, Start Date..., and Availability dates will default to the configuration’s settings for each volunteer. If you wish to change any of these settings for a volunteer, you may do so using the fields provided.
14. In the “Choose Volunteer” field, type the name of the desired volunteer.
  - a. If the volunteer exists in the system, their name will appear. Click on the volunteer’s name to assign them.
  - b. If the volunteer does not exist in the system, press **Enter** on your keyboard. A window will open allowing you to enter the volunteer into the VolunteerEasy system. If you wish to create a user account for the volunteer, set the slider to **Yes**; the volunteer will receive an account set-up email. Enter the volunteer’s First and Last Names, Email, and Mobile Phone number. Then, click **Save**.
15. Repeat steps 13-14 for each volunteer. When done, click **Save**.

## Manually Assign a Volunteer to a Location

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

 This tool is helpful when dividing large opportunities between multiple volunteer coordinators. The workload can be easily divided by assigning each volunteer coordinator to manage the volunteers of a particular location using the [Assign a Volunteer Coordinator to an Opportunity](#) tutorial.

1. From the **Main Menu**, click **Opportunities** then **Our Opportunities**.
2. Next to the desired opportunity, click **Manage Volunteers** in the dropdown menu.
3. Next to the desired volunteer, click **Add Location** in the dropdown menu.
4. Select the desired location from the dropdown menu, then click **Add**.

## Meal Module

This module is an add-on available for organizations that deliver meals to clients at home to track client participations, create meal plans for clients, and to create delivery schedules for volunteers.

For more information on the Meal Module add-on, read the [Meal Module](#) tutorial.

- ◆ This module is integrated with our CRM.
- ◆ To purchase this add-on, see [Purchase Add-Ons](#) tutorial.

## Meals on Wheels Module

This module is an add-on available for organizations who deliver meals to clients at home to track delivery routes and drivers.

For more information on the Meals on Wheels add-on, read the [Meals on Wheels](#) tutorial.

- ◆ To purchase this add-on, see [Purchase Add-Ons](#) tutorial.

## Schedule a Volunteer

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

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

## Add a Schedule

1. From the **Main Menu**, click **Opportunities** then **Our Opportunities**.
2. Next to the desired opportunity, click **Manage Volunteers** in the dropdown menu.

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3. Next to the desired volunteer, click **Scheduling** in the “Next Step” column.  
*Note:* If the volunteer has set their own schedule, “Log Hours” will appear. Click **View Schedule** in the dropdown menu to view the schedule.
4. Select the Venue, Slot, and Position to which you are assigning the volunteer.  
*Note:* By default, you can only select from active venues and slots. To include venues and slots from inactive schedules as well, check the “Select from all Location(s) and Slot(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

If there are any changes or you want to cancel a created schedule, you can choose to edit or delete the schedule.

1. From the **Main Menu**, click **Opportunities** then **Our Opportunities**.
2. Next to the desired opportunity, click **Manage Volunteers** in the dropdown menu.
3. Next to the desired volunteer, click **View Schedule** in the dropdown menu.
4. To edit a schedule: Click **Edit**. Follow steps 4-6 from the [Create a Schedule](#) tutorial above.
5. To delete a schedule: Click **Delete** in its dropdown menu, then click **OK**.  
*Note:* Some subscriptions include a “Batch Schedule Changes” tool, allowing organizations to edit the schedules of multiple volunteers at once.

## Add Multiple Schedules for a Single Volunteer

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

1. From the **Main Menu**, click **Opportunities** then **Our Opportunities**.
2. Next to the desired opportunity, click **Manage Volunteers** in the dropdown menu.
3. Next to the desired volunteer, click **Add Schedule** in the dropdown menu.
4. Follow steps 4-6 from the [Create a Schedule](#) tutorial above to fill in the information for the new schedule.
5. If you are done scheduling for this volunteer, click **Save**. If you wish to create another schedule, click **Save & Add New**. Set the new schedule, then click **Save**.

## Batch Schedule Changes

To change the schedule of multiple volunteers who are scheduled for the same opportunity and slot, the Batch Schedule Change tool would be handy.

1. From the **Main Menu**, click **Opportunities** then **Batch Schedule Changes**.

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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 volunteers who match the selected schedule will appear. Check the boxes next to the volunteers 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 Volunteer

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

### Verify Hours Logged by a Volunteer

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

1. From the **Main Menu**, click **Opportunities** then **Our Opportunities**.
2. For those opportunities with unverified hours, there will be a total 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**.
4. To approve multiple time log entries, select the checkboxes next to the hours then click **Approve**. To reject, click **Reject** in the dropdown menu, enter a reason, and click **Reject**.

### Log Hours Manually

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

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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 Add Hours Tool

To log hours for an event or a volunteer in bulk, use the “Add Hours” tool.

- 👍 Use this when you want to add hours for a date range or for multiple volunteers at one time.
1. From the **Main Menu**, click **Add New** then click **Add Hours**.
  2. Select the desired opportunity.
  3. To narrow down the list of volunteers for whom you are logging hours, select the schedule date range, location, shift, and/or position. To search for a particular volunteer, enter the volunteer’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 volunteer, 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 volunteer attended or checked in to their scheduled slot, use the “Attendance” tool.

1. From the **Main Menu**, click **Opportunity** and then click **Our Opportunities**.
2. Click the name of the desired opportunity.
3. On the left hand panel, click **Attendance**.
4. Select the desired date, then click **Get Attendees**.
5. Next to each volunteer who attended their shift on the selected date, click **Check In**. If the volunteer did not attend, click **No Show** in the dropdown menu then select the reason for no show. Alternatively, to check in *all* of the volunteers listed, click **Check In All**.  
*Note:* If you kept the “Auto Log Hours When Marked As Attended” slider activated when creating the opportunity, hours that are checked in are automatically counted as verified hours.
6. Repeat steps 4-5 above for each desired date.

### Time It

With the “Time It!” add-on, volunteers can check-in and out in real-time while volunteering for any opportunity as it can be launched from a computer or mobile device located on site.

For more information on the Time It add-on, read the [Time It](#) tutorial.

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- ◆ For accounts that do not have Time It included on the plan, it can be [purchased as an add-on](#).

# Manage Volunteers' Accounts

To better manage their volunteers, organizations have the ability to edit and update the volunteers' accounts. Please note that all tasks related to [scheduling](#), [logging hours](#), and [communicating with volunteers](#) appear in separate sections of this user guide.

## Manually Create a Volunteer's Account

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

1. From the **Main Menu**, click **Add New** then click **Add Volunteer**.
2. Enter the volunteer's personal information (only first and last names are required).
3. To allow the volunteer to manage their own account, check the **Send Account Setup Link to the volunteer** box at the top. Enter an email address for the volunteer.
  - 👍 This is highly recommended, as it allows the volunteer to personalize and manage their own account.
4. Click **Save**.
5. After saving, several tabs will become available in which you can provide additional information about the volunteer. If desired, complete each tab, clicking **Save and Next** or **Save** after each.

## Assign Tags to Volunteers

A tag is a flag that can then be used to quickly identify a specific group of volunteers. Tags are created in the "Tags" section of the [Configurations](#) tutorial and can be assigned to volunteers here.

- 👍 To locate all volunteers who have a specific tag, conduct a [Search for Volunteers](#) and select the tag in the "Criteria" section.
  1. From the **Main Menu**, click **Volunteers** then click **Volunteer list**.
  2. To assign tag(s) to an individual volunteer: Click **Assign Tag(s)** in the volunteer's dropdown menu. Select the desired tag(s), then click **Assign**.
  3. To assign tag(s) to multiple volunteers: Check the boxes next to the names of the desired volunteers. Then, select **Assign Tag(s)** from the "**Selected Volunteers/Teams**" dropdown menu and click **Apply**. Select the desired tag(s), then click **Assign**.
  4. To assign tag(s) to all of the volunteers listed: Select **Assign Tag(s)** from the "**All Search Result**" dropdown menu and click **Apply**. Select the desired tag(s), then click **Assign**.

## Search for Volunteers

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

1. Click the **Search field** at the top.
  - a. To search for an individual volunteer, enter the volunteer'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 click **Volunteers** then **Search Volunteer**.
2. Under "Volunteer 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](#) tutorial for help.
4. When done, click **Search**. A list of volunteers who match your search will appear.
  -  As a shortcut to using the [Default Reports](#) and [Custom Reports](#) features, try conducting an advanced search for volunteers and clicking the **Export** button. The system will generate an Excel file of the volunteers who match the search.
5. If you wish to edit your search criteria, click **Update Search** at the top right corner of the Volunteer list screen, enter the desired criteria, and click **Save**.
6. To view a volunteer's profile, click on the name of the volunteer.  
*Note:* If only one volunteer matched your search, the volunteer's profile will open automatically.

## View and Edit a Volunteer's Profile

All of a volunteer's activities (e.g., training, hours) and account information (e.g., contact information, causes) can be found on their volunteer profile. Organizations can also edit a volunteer's profile.

-  A volunteer's profile includes their personal preferences and information. Do not edit a volunteer's profile unless they request your help or you need to add information for administrative purposes.
1. Open the desired volunteer's profile using the [Search for Volunteers](#) tutorial above.
  2. To edit the volunteer's information, click **Edit Volunteer**.
  3. Make the desired changes, then click **Save and Next**.
  4. When done, click **View Volunteer** to return to the volunteer's profile.

## Schedule Time Off for a Volunteer

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

*Note:* Use the “Time Off” only when the volunteer is temporarily taking a time off from volunteering. If they are on leave indefinitely, you can make them inactive by following the [Deactivate Volunteers](#) tutorial.

1. Open the desired volunteer’s profile using the [Search for Volunteers](#) tutorial above.
2. To schedule the volunteer’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 volunteer’s time off.
5. The “Reason” field is optional.
6. Click **Next**.
7. If there are volunteer 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 volunteer schedules and you will find this Time Off under the volunteer’s “Vacation History”.

## Reset a Volunteer’s Password

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

*Note:* Do not reset a volunteer’s password without their permission.

1. Conduct a search for the volunteer using the [Search for Volunteers](#) tutorial above.
2. A list of volunteers who match your search will appear. Click **Reset Password** in the dropdown menu next to the desired volunteer’s name.  
*Note:* If only one volunteer matched your search and the volunteer’s profile opened automatically, return to step 1 above and conduct a broader search. The password reset feature is not available on a volunteer’s profile and must be assessed from the list view.
3. A temporary password will be sent to the volunteer’s email address.

## Deactivate Volunteers

If a volunteer is no longer active with your organization, you can deactivate that volunteer. Deactivating volunteer(s) will cancel all future schedules and will not be recovered.



Instead of removing, volunteers who have history (e.g. logged hours) should be deactivated to.

1. From the **Main Menu**, click **Volunteers** then click **Volunteer list**.

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2. To deactivate an individual volunteer: Click **Deactivate** in the volunteer's dropdown menu.
3. To deactivate multiple volunteers listed: check the boxes next to the names of the desired volunteers. Then, select **Deactivate** from the "Selected Teams/Volunteers" dropdown menu.

## Delete Volunteers

If a volunteer is no longer active with your organization and you wish to completely remove the volunteer record from your database, you can remove/delete that volunteer. Deleting volunteer(s) will cancel all future schedules and any hours tied to it permanently.

Note: This action cannot be undone.

- 👍 Volunteers should be removed if you wish to delete all history (e.g. logged hours). Otherwise, you can follow the [Deactivate Volunteer](#) tutorial.
1. From the **Main Menu**, click **Volunteers** then click **Volunteer list**.
  2. To remove/delete an individual volunteer: Click **Remove Volunteer** in the volunteer's dropdown menu.
  3. To delete/remove multiple volunteers listed: check the boxes next to the names of the desired volunteers. Then, select **Remove Volunteers/Teams** from the "Selected Teams/Volunteers" dropdown menu.

## Sterling Volunteers

The screening process and tracking of volunteers is easier with the Sterling Volunteers integration. This add-on allows organizations to initiate the background check from the system which will submit a request to Sterling Volunteers.

For more information on the Sterling Volunteers add-on, read the [Sterling Volunteers](#) tutorial.

- ◆ For accounts that do not have Sterling Volunteers included on their plan, it can be [purchased as an add-on](#).

## Business Module

The Business Module add-on was designed to record businesses, their contact information, employee information, team information and to manage their volunteer hours. For clients with Fundly CRM accounts, the information can be synced both ways.

For more information on the Business Module add-on, read the [Business Module](#) tutorial.

- ◆ To purchase this add-on, see [Purchase Add-Ons](#) tutorial.

## Create and Manage Programs

Some organizations have the ability to add “programs” to their accounts. Programs are used to represent recurring events or projects directed by your organization, such as an annual day-of-service or a community clean-up. Programs must be actively managed by your organization

*Note:* Data tied to Programs can be generated in a report.

### Create a Program

1. From the **Main Menu**, click **System Configurations** then **Programs**. A list of your programs will appear, including data regarding the number of opportunities, volunteers, 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 organization. To add a sponsor, follow the [Sponsors](#) section of the [Website Integration](#).
6. Select any Agreements that you want volunteers to consent to before participating in this program.  
*Note:* To add an agreement, follow the [Agreements](#) section of the [System Configurations](#) 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 organization’s public site, activate the **Display on public site** slider.
9. Enter a description of the program in the “Body” field. If desired, you can use the formatting options available.
10. When done, click **Save**.
11. To edit a program: Click **Edit**. Make the desired edits, then click **Save**.
12. To delete a program: Click **Delete** in the dropdown menu, then click **OK**.

### Program Level Security

After creating a program, organizations 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 are able to see and manage the opportunity.

*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**.
2. Click **Program Level Security**.

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3. 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**.
4. 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**.
5. To delete a user or program: Click **Remove** next to the desired user or program.

# Communicate with Volunteers

Organizations can communicate with volunteers directly through their accounts.

## Send Direct Email

Direct email refers to a simple email containing text and attachments. Use one of the methods below to send a direct email to a single or small number of volunteers. If you are communicating with a large number of volunteers or wish to use a template, it is recommended that you follow the [Send Newsletter](#) tutorial instead.

1. If you know the name(s) or email address(es) of the desired recipient(s):
  - a. Click **Inbox** at the top right next to your username.
  - b. Click **Compose**.
  - c. Next to “To,” select **Volunteer**.
  - d. Type the name of a volunteer in the “To” field and click on their name when it appears, or enter the volunteer’s email address. Continue adding volunteers, pressing **Enter** on your keyboard after each entry.
2. If you wish to search for recipient(s) using advanced criteria (e.g., City, Skill):
  - a. Conduct an advanced search for the volunteers with whom you wish to communicate using steps 1-4 of the [Search for Volunteers](#) tutorial.
  - b. In the list of volunteers, check the boxes next to the names of the desired volunteers.
  - c. To email all of the volunteers listed, select **Send Email** from the “All Search Results” dropdown menu.  
To only email some of the volunteers listed, check the boxes next to the names of the desired volunteers. Then, select **Send Email** from the “Selected Volunteers/Teams” dropdown menu.
3. If you wish to send a direct email to *all* of your volunteers:
  - a. From the **Main Menu**, click **Volunteers** then **Volunteer list**.
  - 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.

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6. If you wish to set or edit your email signature, click on **Click here to set Email Signature**. Follow the [User 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 Newsletter

This 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. Use the method below to communicate with a large number of volunteers.

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

- a. If you wish to create a template (e.g., newsletter, volunteer appeal) that your organization 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 click **Create New Communication**.

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*Note:* To email all volunteers 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.

2. Create a Name to help you identify this piece of communication (i.e. March 2020 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 volunteers 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:** Volunteer did or did not provide information for the criteria
  - g. **Is False/Is True:** Volunteer 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

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- 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. Volunteers 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 VolunteerEasy 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

Your organization can create and customize templates to communicate with volunteers from the system.

- 👍 Templates are especially useful for recurring communication purposes, such as weekly newsletters or volunteer appeals.

*Note:* Every time you send the template to volunteers, 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 **Communication** then **Templates** under Configurations.
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.

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### 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

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- 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 organization 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 volunteers. When you are done populating the template, you can send it to volunteers using the [Send Newsletter](#) tutorial.

1. From the **Main Menu**, click **Communications** then **Templates** under Configurations.
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**.

## View Communication History

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

### View and Reply to Incoming Communication

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

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4. To review an email: Click on the email in the pane at the left of the screen. It will appear in the right pane.
5. To reply to an email: Click on the desired email. Then, click **Reply**, compose the email, and click **Send**.

## View Outgoing Communication

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

## 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 send the copy now: Refer to the [Send Newsletter](#) 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

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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 Volunteer Coordinators

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

### Assign a Volunteer Coordinator to an Opportunity

If the individual you would like to assign as a volunteer coordinator already has a volunteer account, follow the steps below.

1. From the **Main Menu**, click **Volunteers** 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 volunteer coordinator to manage.
4. To assign a volunteer, set the slider to **Volunteer**. Then, type the name of the individual you wish to assign in the “Choose Volunteer” field and click on their name.
5. To assign a user, set the slider to **User**. Then, select the user you wish to assign in the “Select User” field.
6. Select the Start date and End date of when the volunteer or user is assigned as a coordinator. If the volunteer or user remains as the coordinator for an indefinite period, leave the end date blank.
7. Click **Assign**.

### Create a Volunteer Coordinator Account

If the individual you would like to assign as a volunteer coordinator does not have an account, follow the steps below.

1. From the **Main Menu**, click **Volunteers** then **Volunteer Coordinators**.
2. At the bottom right corner of the screen, click **Create New Coordinator**.

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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 volunteer coordinator to log in to the account.
4. Click **Save**.
5. Once the account is created, you may assign this volunteer coordinator to an opportunity by following the steps above in [Assign a Volunteer Coordinator to an Opportunity](#).

## Remove an Existing Volunteer Coordinator

1. From the **Main Menu**, click **Volunteers** then **Volunteer Coordinators**.
2. Find the volunteer coordinator you wish to remove.
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 Volunteer Coordinator

1. From the **Main Menu**, click **Volunteers** then **Volunteer Coordinators**.
2. Find the volunteer coordinator you wish to substitute.
3. Click **Substitute** next to Volunteer's name and email.
4. Select the Start Date and End Date of when the new volunteer or user becomes a substitute.
5. Find the opportunity from which you wish to substitute the coordinator.
6. To substitute with a volunteer, set the slider to **Volunteer**. Then, type the name of the individual you wish to assign in the "Choose Volunteer" field and click on their name.
7. To substitute with a user, set the slider to **User**. Then, select the user you wish to assign in the "Select User" field.
8. Click **Substitute** to make the change.

## Application Forms

Your organization may require volunteers 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](#) 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 "Volunteer Application Form" screen, create a name for the form.

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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 **delete 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**.

## Orientation & Training Sessions

If your organization requires volunteers to attend orientation or training sessions when applying for an opportunity, you can use the system to organize these sessions.

## Create an Orientation or Training Session

You must first create your orientation or training session. Then, refer to the [Create a Basic Opportunity](#) tutorial to learn how to add it as a requirement for your opportunity. The system 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 of volunteers per session.
5. If you want to allow volunteers to cancel their session, set the **Allow RSVP...** slider to “Yes.”
  -  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 volunteers must attend.

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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 opportunity
  - 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 Slot” window will open, allowing you to set a slot (i.e., start and end time) for this session.
  - a. Enter a Slot Name.
  - b. If applicable, select the Slot Day(s) to which this schedule applies.
  - c. Set the Start and End Times. If volunteers 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.
    -  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**.
20. The training session is now created. If you are associated with a VAC or University and you want to make it available there as well, check the box next to the name of the VAC and click **Publish/Unpublish to Action Center**.

## Assign a Volunteer to a Training Session

While volunteers will be prompted to schedule themselves for required training sessions when applying for an opportunity, you can also manually assign volunteers to training sessions.

-  This tool is helpful if you want to assign current volunteers to additional training, assign individual volunteers to specialized training based on job function, etc.

1. From the **Main Menu**, click **Opportunities** then **Orientations & Trainings**.

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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, Slot, and Date of the session.
4. Select the volunteer(s) you want to assign to this training session. Use the search field if desired.
5. 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 volunteer from the session, click the **remove icon** next to the volunteer’s name, then click **OK**.
5. When done, click **Save**.

## Mark Attendance for a Training Session

You must manually mark a volunteer’s attendance to an orientation or training session.

*Note:* The system does not allow volunteers 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 volunteers to begin scheduling.

1. From the **Main Menu**, click **Opportunities** then click **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, Slot, and Date of the session. A list of all attendees for the selected session will appear.
4. To mark a volunteer as having attended the session, set the slider under the “Attended” column to “Yes.”
5. When done, click **Save**.

## Delete a Training Session

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

## Create Reports

Organizations can create reports that pull information from their database.

### Default Reports

Default reports are most convenient due to their predefined settings. They are available in categories such as opportunities, programs, training, and volunteers, as well as reports specific to modules or add-ons such as university and meal.

#### Set Filters

1. From the **Main Menu**, click **Reports**.
2. Expand **Default reports** from left hand panel.
3. Below default reports, a list of report options appear. Expand the desired report type.
4. A list of further refined report types will appear. Select the desired report for a description of the report at the bottom.
5. Click **Run Report** from the dropdown menu next to the desired report.  
*Note:* Each report has a default format; to export the report in a different format, select the desired format from the dropdown menu.
6. 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).
7. 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 the **Arrow** to add.
8. 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**.
9. 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.
10. If desired, check the **Group With Next Filter** box and select either “AND...” or “OR...” from the dropdown menu.
11. To run the report, click **OK**.
12. Save your report to your computer. The process of saving reports differs based on the execution format chosen.

#### Schedule a Report

The system gives users the ability to schedule reports to run at another time.

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-  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 VolunteerEasy. 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

The system 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 **Duplicate** in the report's dropdown menu.
3. Enter a new name for the report and select your organization folder under **NonProfitEasy** folder as the saved location of the copied report.
4. Click **Okay**.
5. To access the report, go to the **Main Menu**, click **Reports** then expand the **NonProfitEasy** folder then your organization folder.

### Custom Reports

Custom reports are an advanced tool not covered in this guide. 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)

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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

Also, 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 expand the **NonProftEasy** folder then your organization folder.
2. Use the [Set Filters](#) tutorial above for help editing or customizing the report.

## Website Integration

You are able to design and customize your public site to represent your organization. Your public site is where volunteers will initially create an account with your organization and where they can return to perform tasks such as searching for opportunities, viewing opportunity calendars, making donations, and accessing your social media accounts.

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

## Preview Public Site

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

1. From the **Main Menu**, click **Website Integration** then **Design My Public Site**.
2. A preview of your organization'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** then **Design My Public Site**.
2. Click the arrow next to "Edit Template" on the right side of the screen. This will expand the templates and configurations panel.
3. In the "Templates" tab, select your desired template.
4. In the "Configure" tab, select your desired colors for the template and background.
5. If desired, you may connect to your Google Analytics account by entering the HTML code from Google in the "Google Analytics Script" content box.
6. 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** and click **Website Integration** then **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 the Volunteer Management platform 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 volunteers and users should contact if they experience any problems
  -  It is recommended that you provide at least your organization’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 Volunteers) you wish to display
6. **Home Content:** Add content (e.g., text, images) to appear on Home page
7. **Hide/Show Recent 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. Volunteers, Teams) 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

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menu types (e.g. Volunteer 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**.

**Volunteer/Team Signup:** Links to volunteer, or team 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 organization’s opportunities

**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

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 public site. The customization will appear at the end of our standard public site URL, <https://www.volunteereasy.com/site/>.

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- ◆ If your organization desires more customization, we also offer a Vanity URL add-on in the [Purchase Add-Ons](#) section. A Vanity URL serves as a powerful marketing tool for an organization to promote its brand to partners and volunteers.
  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**.

## Available Volunteer Slots

This option allows you to display the number of slots available for a particular slot and position.

1. From the **Main Menu**, click **Website Integration** then **Available Volunteer Slot**.
2. If you wish to display available slots on your site, activate the **Display Available slots** slider.
3. Select Layout type – 5 Available or 5 out of 10 available.
4. Click **Save**.

## Display Scheduled Volunteer Names Online

Organizations have the option to display the names of the volunteers scheduled for any particular shift and position online.

-  Enabling this option gives volunteers an idea who they are going to be working with.  
*Note:* This is a global configuration and will apply to all published opportunities.

  1. From the **Main Menu**, click **Website Integration** then **Display Volunteer Names**.
  2. To turn on, activate the **Display Volunteer Name** slider then click **Save**.

## Featured Opportunities

You can select individual opportunities or specific types of opportunities to be featured 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, the first five opportunities are going to be listed alphabetically.

1. From the **Main Menu**, click **Website Integration** then **Featured Opportunities**.
2. 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 (e.g., Earth Day, Breast Cancer Awareness month) or those linked to an upcoming program or event.

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- a. Select the Organization(s) and Program(s) whose opportunities you wish to feature.
  - b. Under “What Would You Like To Do?” select the Cause(s), Skill(s), and Activity Type(s) you wish to feature.
  - c. Under “Appropriate For,” select the Age range(s) you wish to feature. To feature 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 feature.
  - e. If you wish to delete your work and reset all fields, click **Clear Search Criteria**.
  - f. When done, click **Save**.
3. 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 volunteer opportunities on different pages of your public site or external websites to promote your opportunities. With your account, you can create multiple widgets, each customized to display different opportunities. It will then automatically generate the script needed to embed the widget into your public site or an external website.

1. From the **Main Menu**, click **Website Integration** then **Opportunity Search Widget**.
2. To create a new widget, click **Add New Widget** at the bottom right corner of the screen.
3. Enter a Widget Title.
4. To add a Widget Logo, click on **Click here OR Drop file here** and select the desired document from your computer.
5. 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.

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-  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.
6. 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**.
  7. To generate the script for this widget, click **Generate Script**. You can then copy and paste the script into the HTML of your website.
  8. If you wish to delete your work and reset all fields, click **Clear Build Criteria**.  
*Note:* Be sure to save your changes.
  9. Click **Back** to return to the main opportunity search widget screen.
  10. To edit a widget: Click **Edit** next to the desired widget.
  11. To generate the script for a widget: Click **Generate Script** in its dropdown menu.
  12. To delete a widget: Click **Delete** in its dropdown menu, then click **OK**.

## Sponsors

The system allows organizations 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 or 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** then **Sponsors**.
2. To add a sponsor, click **Add New Sponsor** at the bottom right corner of the screen.
3. Enter a Name for the sponsor.
4. Enter the sponsor's Website.
5. Select a Category for the sponsor (e.g., event sponsor, program sponsor, corporation, government agency). Categories will vary according to the organization's preferences and needs.  
*Note:* To create a new Category, type its name and press **Enter** on your keyboard.
6. 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.

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7. 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).
8. To add an image of the sponsor's Logo, click on **Click here OR Drop file here**. Select the desired document from your computer.
9. If you are done, click **Save**. If you would like to add another sponsor, click **Save And Add New** and repeat the above process.
10. When done, you may click **Back** to return to the main sponsors page.
11. To edit a sponsor: Click **Edit**. Make the desired edits, then click **Save**.
12. 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.

## Volunteer Interest Form Widget

The Volunteer Interest Form Widget feature was built to help organizations collect data of potential volunteers visiting their public sites.

1. From the **Main Menu**, click **Website Integration** then **Volunteer Interest Form Widget**.
2. To add a new widget, click **Add New Widget** at the bottom right corner of the screen.
3. Enter the widget title.
4. To add a Widget Logo, click on **Click here OR Drop file here** and select the desired document from your computer.
5. Select the opportunities you wish to apply this widget on.

*Note:* Only Active and Published opportunities (own and partners') are listed.
6. Under "What Would You Like To Do?" select the Cause(s), Skill(s), and Activity Type(s) you wish to include.
7. Select Custom Dataset(s) applicable to volunteers.
8. To save the current configuration and display the sample widget, click **Save**.
9. 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.
10. Click **Save & Generate Script** to display the widget script.
11. You can then copy and paste the script into the HTML of your website.
12. Click **Back** to return to the main opportunity search widget screen.
13. To edit a widget: Click **Edit** next to the desired widget.
14. To view the script for a widget: Click **View Script** in its dropdown menu.
15. To copy a widget, click **Copy** in its dropdown menu.
16. To delete a widget: Click **Delete** in its dropdown menu, then click **OK**.

## Donation Widget

A donation widget allows you to solicit donations on your public site. To create and display a donation widget, you must also have a subscription with our CRM.

For more information on the Donation Widget, read the [Donation Widget](#) tutorial.

## Volunteer Signup

Organizations are able to customize the information a volunteer is able or required to provide when signing up.

1. From the **Main Menu**, click **Website Integration**.
2. Under settings, click **Volunteer Signup**.
3. Next to each item, choose whether to activate or inactivate the slider.  
*Note:* Items with “Make...required [on signup]” require the volunteer to provide the indicated information, whereas items with “Display...” give the volunteer 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 volunteer.
5. When done, click **Save**.

## Team Signup

Organizations 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. Under settings, click **Team Sign Up**.
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.
5. When done, click **Save**.

## Pledge Campaign

As an alternative for asking donations, non-profit organizations can ask people to pledge in volunteer hours. With our volunteer management solution, you can activate this add-on feature to track these pledges.

For more information on the Pledge Campaign add-on, read the [Pledge Campaign](#) tutorial.

- ◆ To purchase this add-on, see [Purchase Add-Ons](#) tutorial.

## Log out of your Account

1. Click the dropdown next to your username found at the top right of the screen.
2. Click **Log Out**.