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Quick User Guide

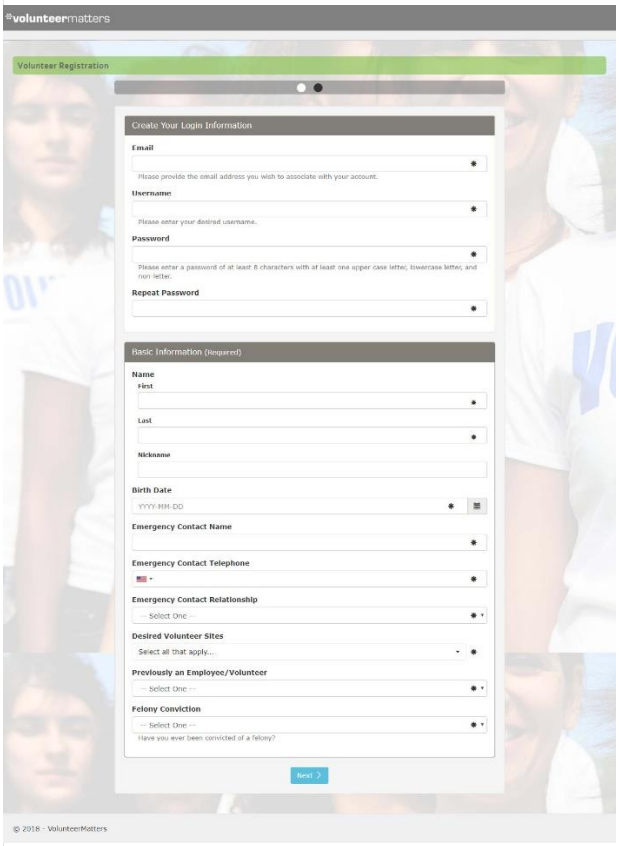
Volunteer Experience

Volunteers may gain access to your Volunteer Management System either as a public/guest user (does not need a login) or as a registered user (needs a login).

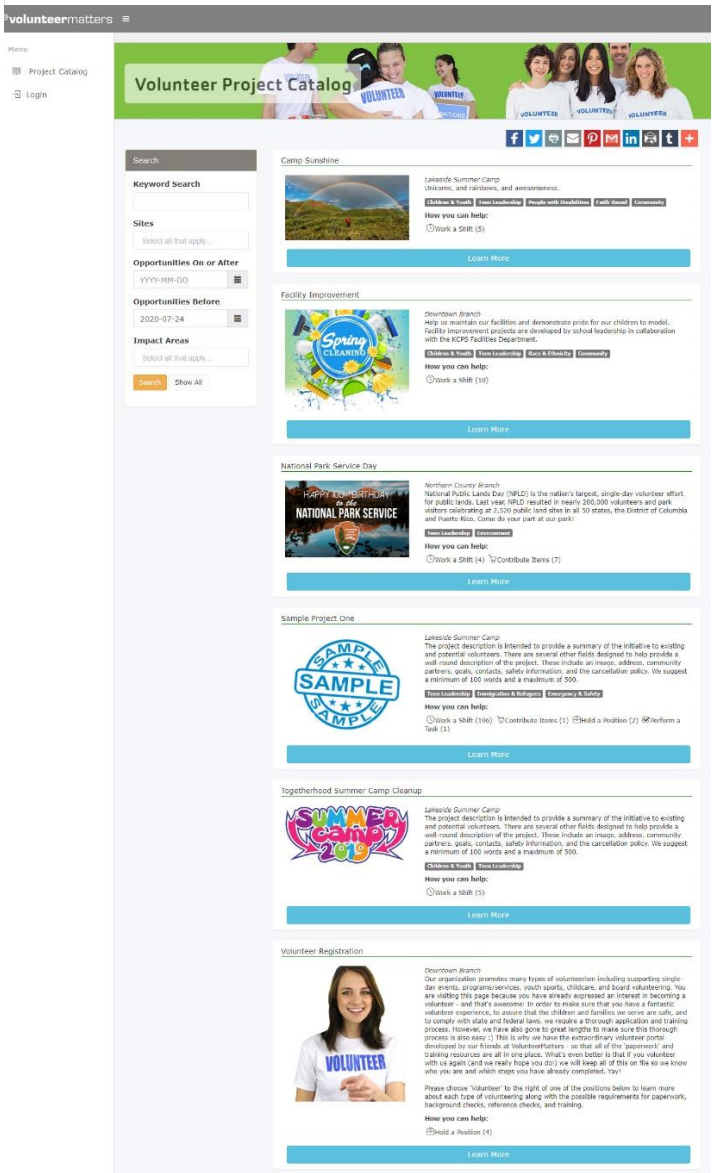
Public/Guest

A public user can register as a new user either by visiting the registration form directly (https://customercode.volunteermatters.org/register) or by browsing your volunteer project catalog and attempting to sign-up for a need (https://customercode.volunteermatters.org/project-catalog).

Registration form



Volunteer Project Catalog



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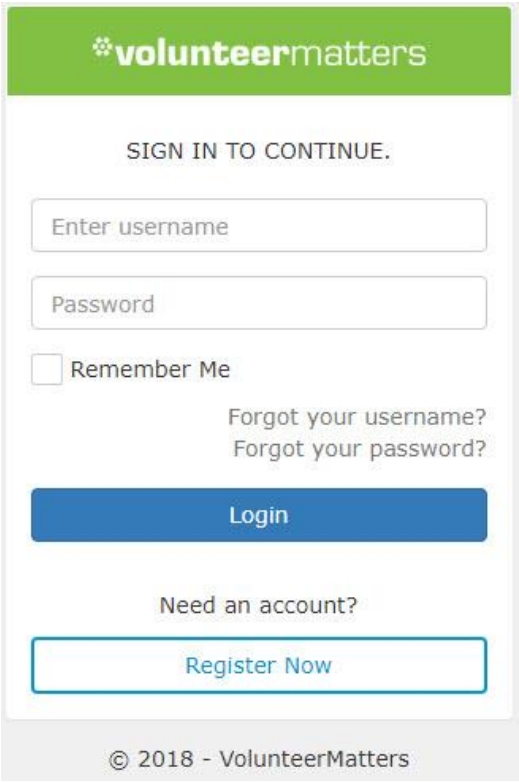
Registered User

A registered user may log into the portal to keep up to date on all volunteer announcements, manage assignments, provide feedback, update their profile information, and browse and sign-up for new volunteer needs. A user may visit https://customercode.volunteermatters.org and they will be presented with a login screen.



First-time visitors to the portal should enter the username and password they defined as part of their registration process. If the registered user has forgotten their username and/or password there are utilities to help recover and reset them. If a visitor who had never registered found this login screen, there is a link here to "Register Now" which will bring them to the registration form.

Volunteer Dashboard

The "home" page for the volunteer portal is called the "Volunteer Dashboard". Users may return to the dashboard at any time by clicking the logo at the top-left of the screen. The dashboard provides access to:

1) Site Navigation (My Profile, Project Catalog, Login/Out)
2) Volunteer Assignment Feedback (automatically displayed for completed assignments, removed when submitted)
3) Announcements (managed by administrators)
4) My assignments (list of current assignments, can submit position hours, if applicable)
5) Volunteer opportunity search (project catalog)
6) My profile (view/edit contact and biographical information and manage system username and password)

A shift check-in can also be at the top of the dashboard if the volunteer is within 1 hour of their shift beginning for a project that requires check-in. Click here for more information on the volunteer check-in process.

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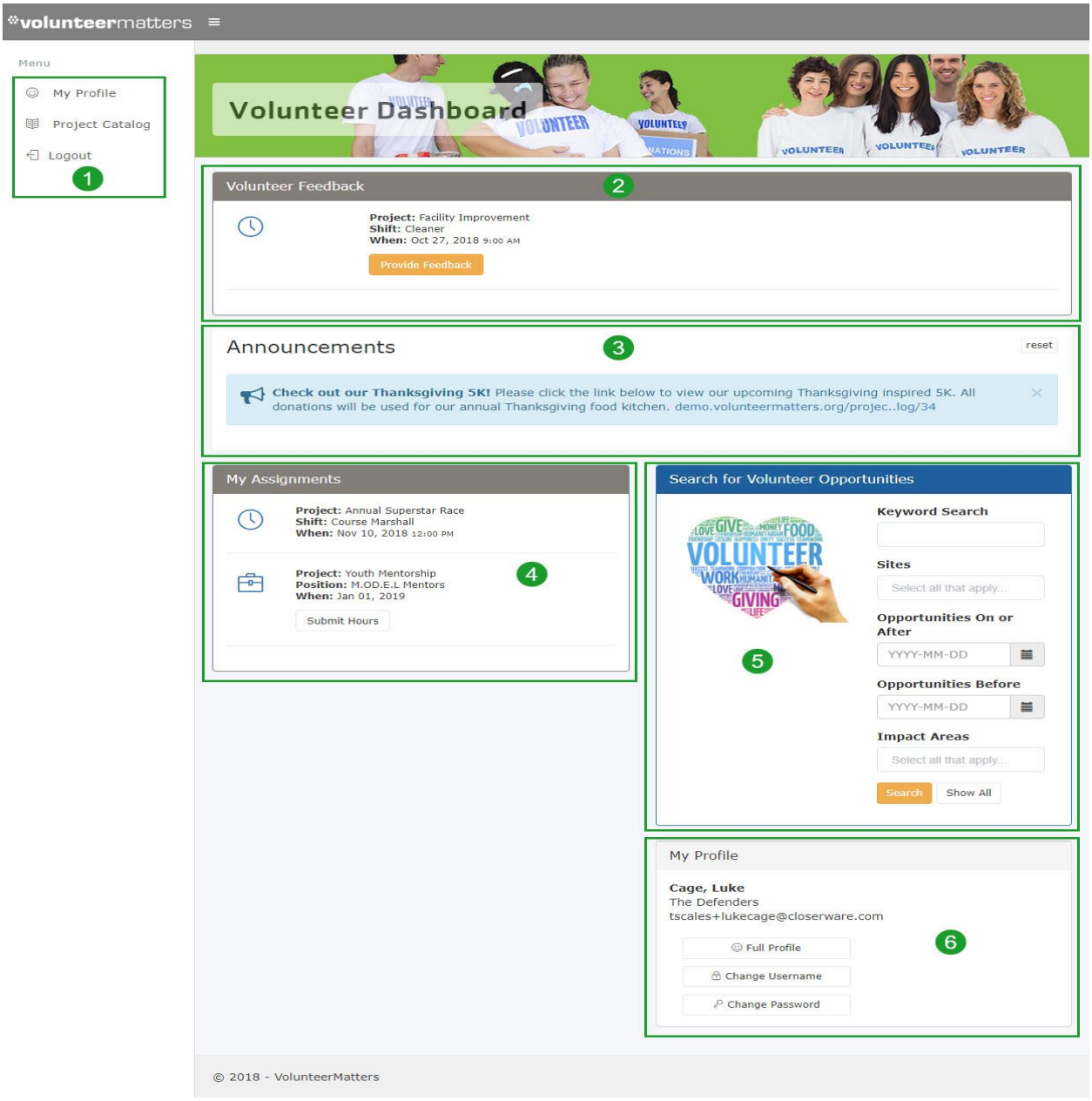

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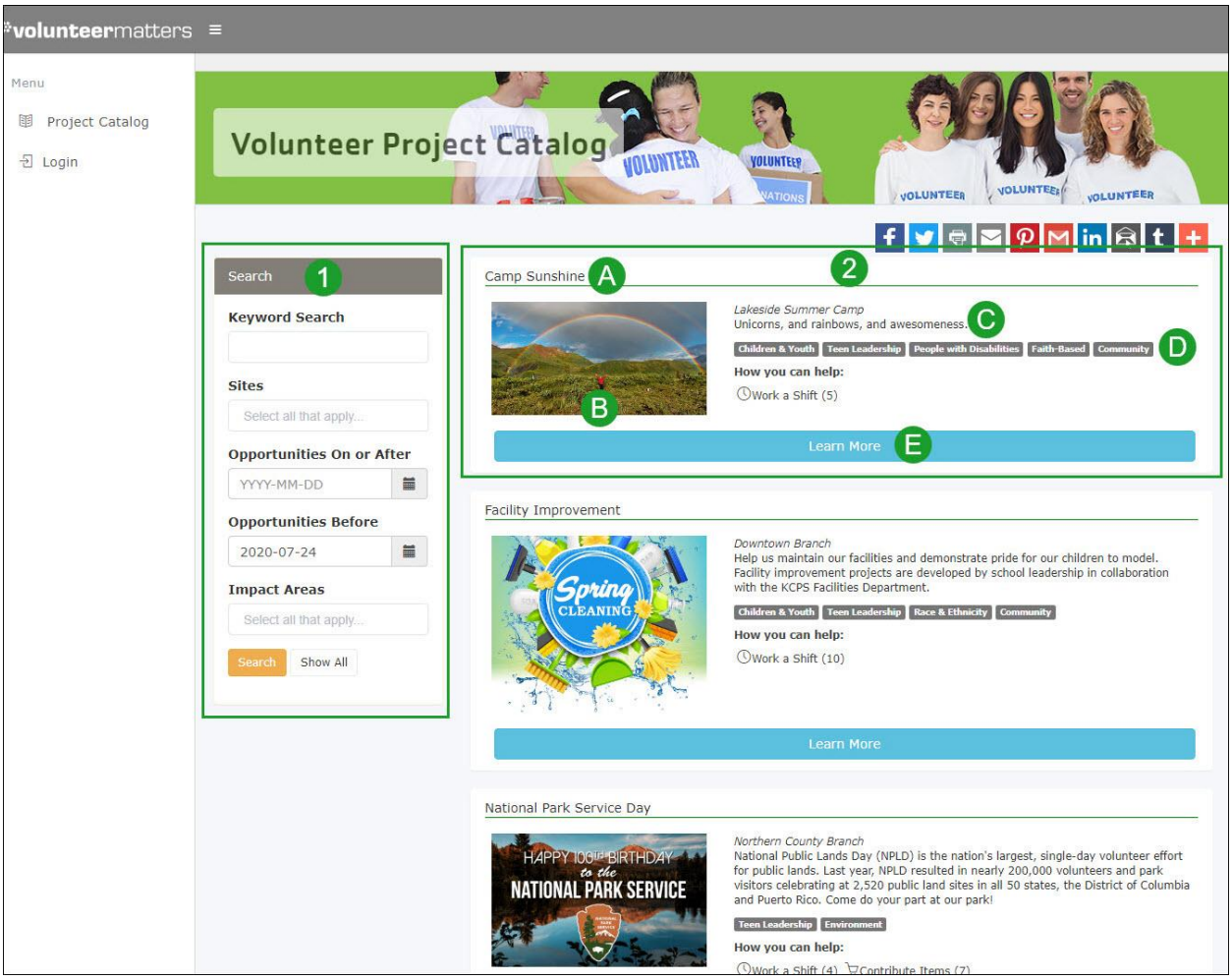
Project Catalog

The project catalog contains all active and published volunteer projects that have current/future needs. Needs may include volunteers to work shifts, contribute items, perform tasks, or take on a longer-term position.

1) The catalog allows a volunteer to narrow their search to include projects affiliated with one or more branches (within the association), date range, and/or any publicly available project tags.

2) Projects are listed with their a) project name, b) image, c) summary description, d) project tags, e) Project Page button/link to view project details including of the project's needs grouped by need type.



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Project Page

The project page contains the project information and all the current/future needs on a project. Needs may include volunteers to work shifts, contribute items, perform tasks, or take on a longer-term position.

Projects are listed with their 1) project name, 2) image, 3 summary description, 4) project classifications and tags, 5) the project address map (if configured), and 6) all of the project's needs grouped by need type.

Need Types:

Shifts - Needs where a volunteer is expected to work a specific role (job) during a predetermined time slot (specific date and time).

Items - Needs where you are asking volunteers to donate or lend item(s) to your cause (food, tools, clothing, etc.). Items have a due date as to when they are expected to be delivered.

Tasks - Needs where a volunteer is asked to "do" something but the work can be done according to the volunteer's schedule. You are only asked to complete the task by a specified date.

Positions - A position is a long-term commitment to take on a more staff-like role for the project or organization. An example might include a volunteer manager, project chair, or committee member.

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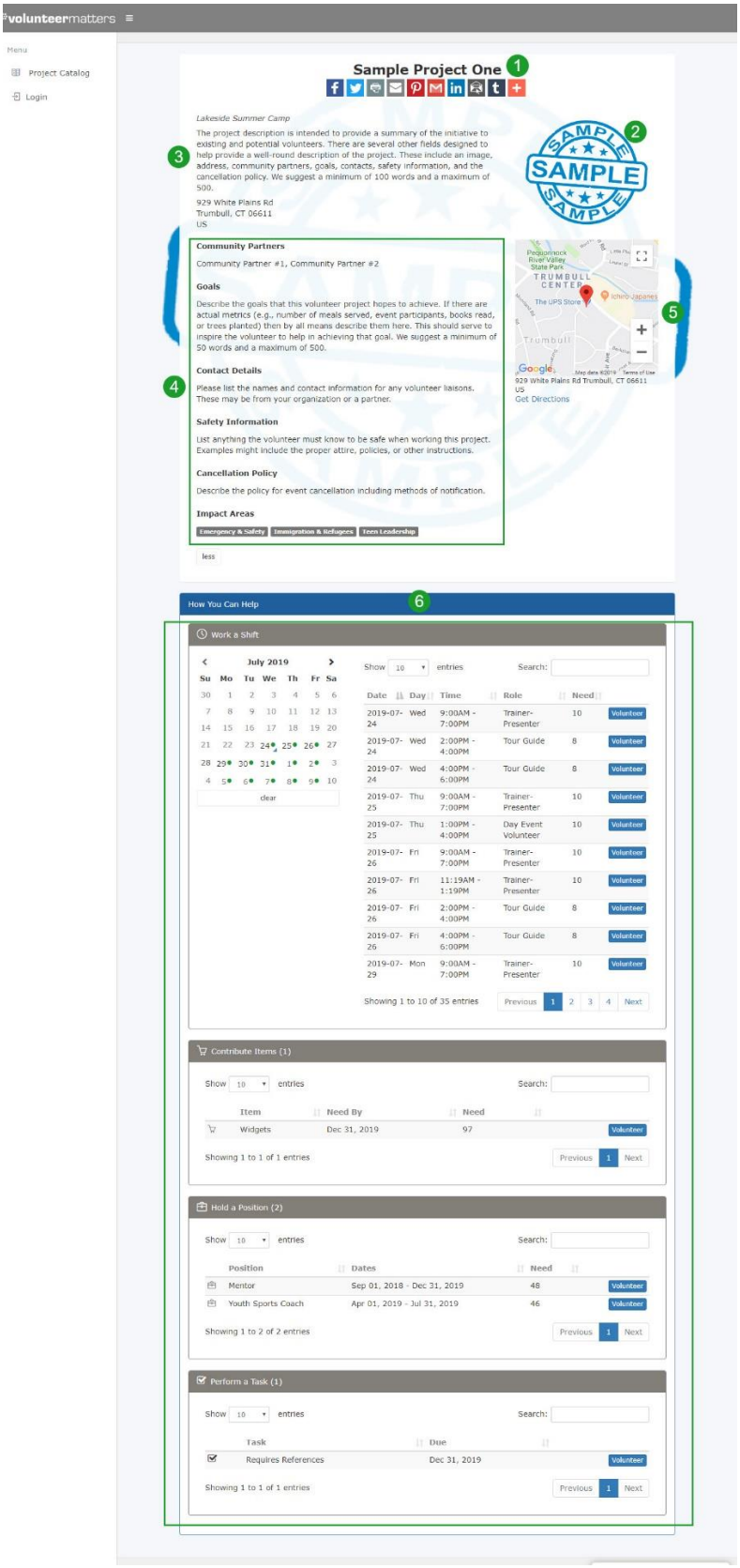
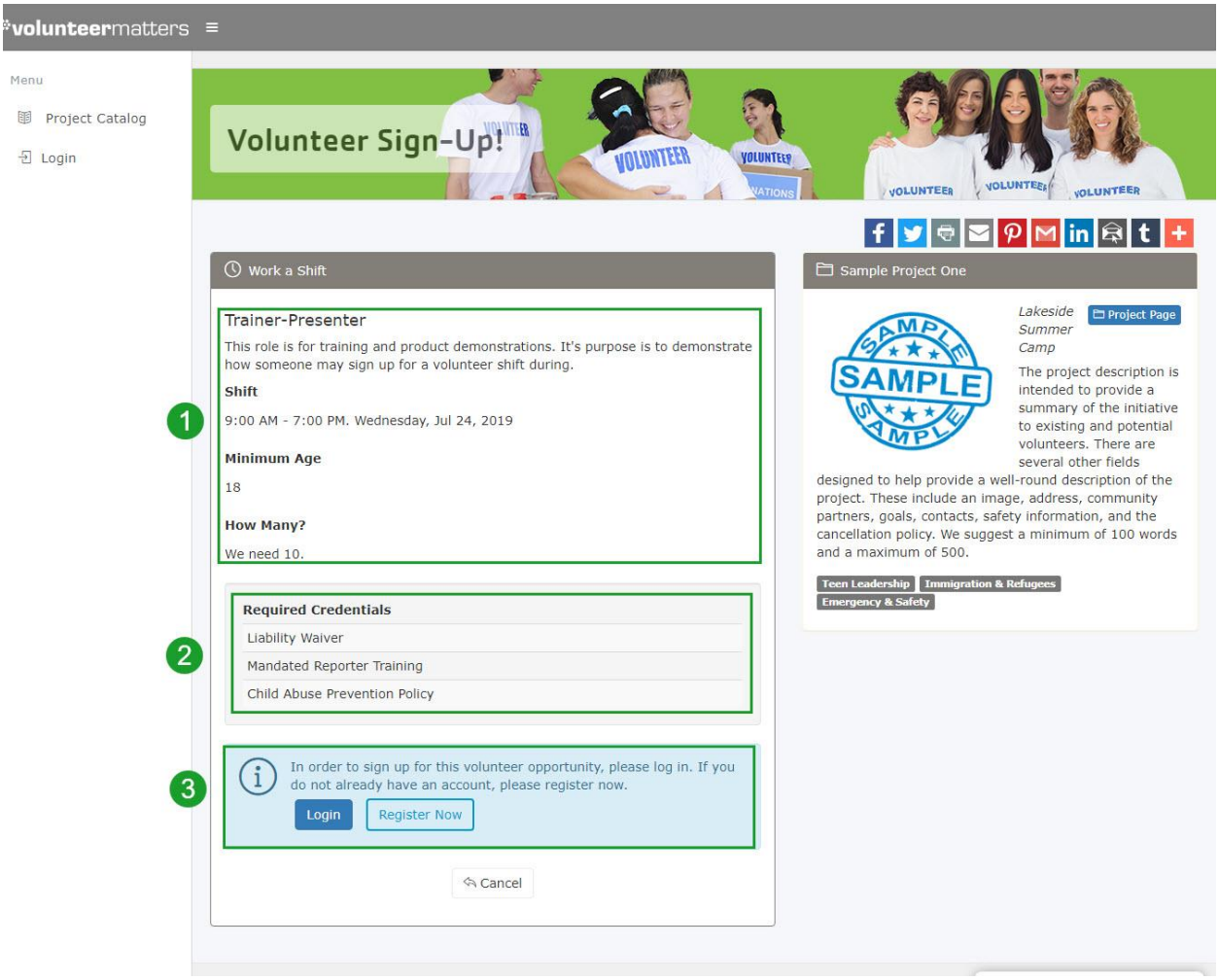


Need Page

The need page contains the need information and all the current/future needs on a project. Needs may include volunteers to work shifts, contribute items, perform tasks, or take on a longer-term position.

Needs are listed with their 1) need details (name, date/times, minimum age, slots open, 2) required credentials (if logged out it will show all credentials even you already have them, if logged in it will only show those still needed and the button to apply), 3) buttons to login (for existing users) and register now (for new users).



For those new users they will be taken to the registration form to begin the registration process. After the registration form, the volunteer is automatically logged into the system and is prompted to complete their credentials. The system determines which credentials are required of all volunteers and those that are required for this specific assignment. This could include a liability waiver, child abuse prevention policy, drivers license, CPR certification, lifeguard training, background check, or any other credential the organization deems necessary. They are customizable per organization and can be marked as being a requirement per volunteer need.

After submitting their credentials, the volunteer is brought back to the project need automatically signed up for it. Any credentials still in process will show on the need that it must be approved/exempted prior to the assignment.

NOTE: If any of the credentials required on the need are "Strict" and require administrator or system intervention they will not be automatically signed up for the need at this time. They must come back when credential is approved or exempted and then sign up for the need.