volunteermatters

3 Easy Steps
While our product empowers you to get everything launched entirely on your own, our support department is standing by to provide any assistance you may need.

1. Create Your Catalog of Volunteer Opportunities
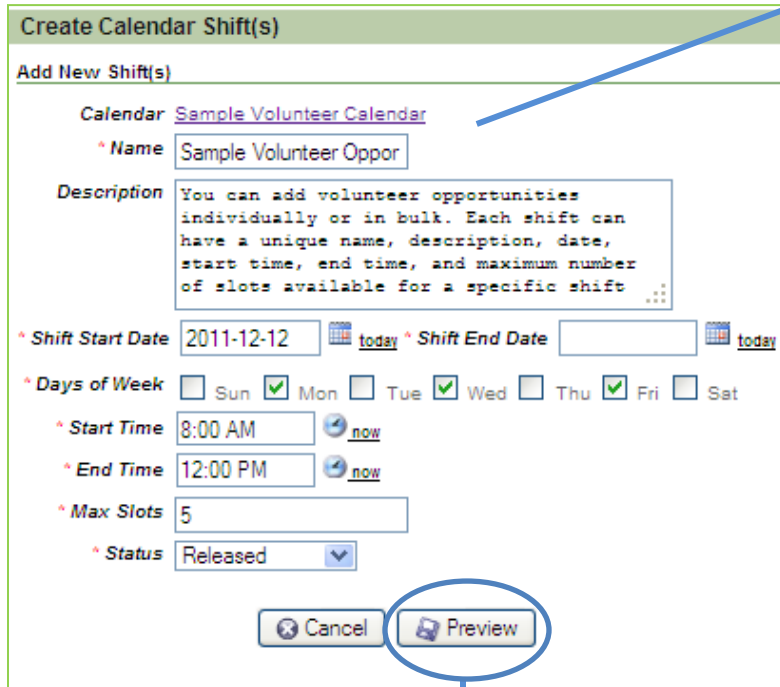
Navigate to the Volunteer Calendar:
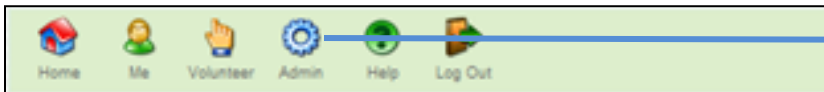
Click on the "Admin" icon

Click on the "General Volunteer Calendar" Icon.

Click "add" button to add new volunteer shifts.

Create Calendar Shift(s)

Add New Shift(s)

Calendar Sample Volunteer Calendar
* Name Sample Volunteer Oppor
Description You can add volunteer opportunities individually or in bulk. Each shift can have a unique name, description, date, start time, end time, and maximum number of slots available for a specific shift

* Shift Start Date 2011-12-12   today   * Shift End Date _____   today
* Days of Week ☐ Sun ☑ Mon ☐ Tue ☑ Wed ☐ Thu ☑ Fri ☐ Sat
* Start Time 8:00 AM   now
* End Time 12:00 PM   now
* Max Slots 5
* Status Released

[Cancel]   [Preview]

When done, click the "Preview button.

Enter volunteer shift information

i. Enter the name and description for this shift

ii. Enter Date Range and Days of Week

Shift that is on a single day:
If the shift you are entering is for a single day, enter that same date in the 'Start Date' and 'End Date' fields. You may check the day of the week that date lands or if you do not know, you may select all days of the week.

Single Shift that spans over two days:
If the shift you are entering is for a single shift on one day but extends into another (e.g., starts at 10pm and ends at 1am), enter that start date of the first day in the 'Start Date' field and add the end date of the second day in 'End Date' field. You may check the days of the week that both dates land or if you do not know, you may select all days of the week.

Shifts that repeat over multiple days:
If you would like to enter a recurring schedule of opportunities you may enter a date range by entering the earliest date of the range in the 'Start Date' field and the last date of the range in the 'End Date' field. Next, chose which days of the week, you would like to be including within that date range. For example, The illustration to the left shows a shift that recurs every Monday, Wednesday and Friday for the entire 2011 calendar year

iii. Enter the start and end times of the volunteer shift.

iv. Enter the maximum number of contacts that may be assigned to this volunteer shift.

v. Choose the proper volunteer shift status.
"Released" shifts allow sign-ups. "Locked" shifts will not allow sign-ups.

![volunteermatters logo]

December 2011 calendar
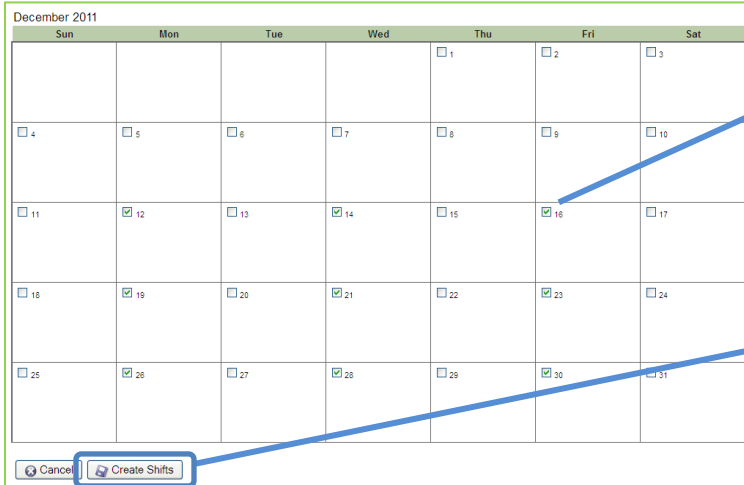
Confirm Dates. You'll notice check marks for each date a shift will be created. This is your opportunity to manually add or remove dates by checking or un-checking the corresponding box.

Once done, click the "Create Shifts" button, at the bottom of the page. Your shifts are now available for volunteers to sign up!
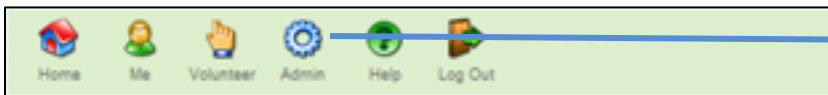
Assign Volunteers to Opportunities

About Volunteer Contacts

With VolunteerMatters Lite you may enter a contact's information individually from the admin menu. For each contact, you may store their name, email, address, telephone, status, and birthdate. To track more detailed information about your volunteers, you may want to consider the Standard or Pro versions of the product. Contacts must be entered into the database prior to being assigned to volunteer opportunities.

Navigate to the Volunteer Calendar

Click on the "Admin" icon

Click on the Calendar

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Manage Assignments for a Specific Volunteer Opportunity

Volunteer Shifts

Calendar: Sample Volunteer Calendar (Active)   Lock In Period: 0 Days. Lock Out Period: 0 Days

add   edit   delete   invite   remind   assign   gen html

View : ⊞ Future Volunteer Opportunities - Next 30 days   Results per Page 10

|◄ ◄ ► ►| 5 total record(s) found. Page 1 of 1   Export List

☑ ☐	Date	Start Time	End Time	Shift	Max Slots	Assigned Count	
1 ☐	2013-04-10	9:00 AM	4:00 PM	Sample Volunteer Opportunity	3	0	🖊 edit 🔧 Assignments
2 ☐	2013-04-17	9:00 AM	4:00 PM	Sample Volunteer Opportunity	3	0	🖊 edit 🔧 Assignments
3 ☐	2013-04-24	9:00 AM	4:00 PM	Sample Volunteer Opportunity	3	0	🖊 edit 🔧 Assignments
4 ☐	2013-05-01	9:00 AM	4:00 PM	Sample Volunteer Opportunity	3	0	🖊 edit 🔧 Assignments
5 ☐	2013-05-08	9:00 AM	4:00 PM	Sample Volunteer Opportunity	3	0	🖊 edit 🔧 Assignments

|◄ ◄ ► ►| 5 total record(s) found. Page 1 of 1

add   edit   delete   invite   remind   assign   gen html

> **Click 'Assignment' to add or remove assignees, or to mark assignees as a 'no-show'.**

Add Assignment:

Shift Assignments

Calendar: Sample Volunteer Calendar (Active)   Lock In Period: 0 Days. Lock Out Period: 0 Days

add   edit   delete   invite   remind   assign   gen html

☑ ☐	Date	Start Time	End Time	Shift	Max
1 ☐	2013-04-10	9:00 AM	4:00 PM	Sample Volunteer Opportunity	3

	Name		Admin Notes
new		👥 choose	

Assigned Contacts   ❌ Cancel   💾 Save

2 ☐	2013-04-17	9:00 AM	4:00 PM	Sample Volunteer Opportunity	3	0	🖊 edit 🔧 Assignments
3 ☐	2013-04-24	9:00 AM	4:00 PM	Sample Volunteer Opportunity	3	0	🖊 edit 🔧 Assignments
4 ☐	2013-05-01	9:00 AM	4:00 PM	Sample Volunteer Opportunity	3	0	🖊 edit 🔧 Assignments
5 ☐	2013-05-08	9:00 AM	4:00 PM	Sample Volunteer Opportunity	3	0	🖊 edit 🔧 Assignments

add   edit   delete   invite   remind   assign   gen html

> **1. Clicking 'Choose' opens the contact chooser window.**

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Choose Contact(s)

Volunteer, Sample (Sam)

View : ⊞ | All Contacts ▼ | 🔧 | Quick Find: | 🔍 | Results per Page 2...

|◀ ◀ ▶ ▶| 4 total record(s) found. Page 1 of 1

☑ ☐		Contact ID	Name	Contact Status	Group(s)	Email	Primary Telephone	Primary Addres...
1	☐	12345	Administrator1, VM-Standard	S - Staff				null
2	☐	23456	Administrator2 VM-Standard	S - Staff				null
3	☐	34567	Administrator3, VM-Standard	S - Staff				null
4	☑	45678	Volunteer, Sample (Sam)	N - New	AmeriCorps		(222) 333-4444	123 Elm Street Anytown, ST 12345 USA

|◀ ◀ ▶ ▶| 4 total record(s) found. Page 1 of 1

[OK]   [Cancel]

2. Check the box to the left of the contact(s).

3. Click 'OK' will bring you back to the ''Add New Assignment' screen.
4. Click 'Save' to finalize your volunteer assignments.

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2. Invite Volunteers into the System

Email Invitations

1. Check the boxes adjacent to the volunteer opportunities to which you would like to invite contacts.

2. Click the 'invite' icon

The system will automatically seed an email with all of the details for the volunteer opportunity including a link to "learn more" which will bring the contact into the system where they can register and sign-up.

3. Click 'Choose' to select individuals from your contact database to invite.

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Publish a List of Volunteer Opportunities on Your Website

Volunteer Shifts

Calendar: Sample Volunteer Calendar (Active)   Lock In Period: 0 Days. Lock Out Period: 0 Days

add edit delete invite remind assign gen html

View : Future Volunteer Opportunities - Next 30 days   Results per Page 10

5 total record(s) found. Page 1 of 1   Export List

	☑ ☐	Date	Start Time	End Time	Shift	Max Slots	Assigned Count		
1	☑	2013-04-10	9:00 AM	4:00 PM	Sample Volunteer Opportunity	3	0	edit	Assignments
2	☑	2013-04-17	9:00 AM	4:00 PM	Sample Volunteer Opportunity	3	0	edit	Assignments
3	☑	2013-04-24	9:00 AM	4:00 PM	Sample Volunteer Opportunity	3	0	edit	Assignments
4	☑	2013-05-01	9:00 AM	4:00 PM	Sample Volunteer Opportunity	3	0	edit	Assignments
5	☑	2013-05-08	9:00 AM	4:00 PM	Sample Volunteer Opportunity	3	0	edit	Assignments

5 total record(s) found. Page 1 of 1

add edit delete invite remind assign gen html

1. Check the boxes adjacent to the volunteer opportunities to which you would like to invite contacts.

2. Click the 'gen html' icon
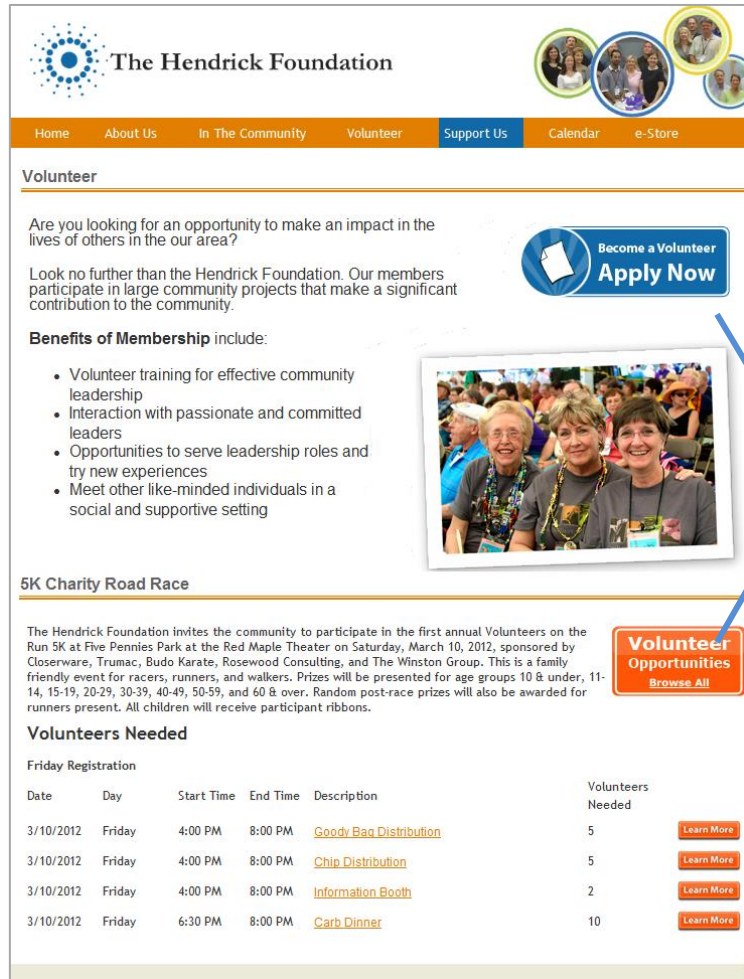
Generated Shift Html

Copy the following Html and place in a web page to display

```
<table style="border-collapse: collapse;font-size: 12px;" border="0" cellspacing="1" cellpadding="2">
<tr>
<th style="border: 1pt solid #000;">Date</th>
<th style="border: 1pt solid #000;">Start</th>
<th style="border: 1pt solid #000;">End</th>
<th style="border: 1pt solid #000;">Name</th>
<th style="border: 1pt solid #000;" colspan="2">Description</th>
</tr><tr>
<td style="vertical-align: top;padding: 1px 3px 1px 3px;border-bottom: 1pt dotted #000;white-space: nowrap;">Wednesday 04/10/2013</td>
<td style="vertical-align: top;padding: 1px 3px 1px 3px;border-bottom: 1pt dotted #000;white-space: nowrap;">9:00 AM</td>
<td style="vertical-align: top;padding: 1px 3px 1px 3px;border-bottom: 1pt dotted #000;white-space: nowrap;">4:00 PM</td>
<td style="vertical-align: top;padding: 1px 3px 1px 3px;border-bottom: 1pt dotted #000;">Sample Volunteer Calendar: Sample Volunteer Opportunity (<a href="
https://www.volunteermatters.net/vm/member/shift/my/ShiftView.do?shiftid=159">3 Open Slots</a>)</td>
<td style="vertical-align: top;padding: 1px 3px 1px 3px;border-bottom: 1pt dotted #000;width: 30em;">Overview:
You can add volunteer opportunities individually or in bulk.  Each opportunity can have a unique name, description, date, start time, end time, and maximum number of slots available for volunteers.

The max-slots will prevent volunteers who self-sign-up from over-filling a volunteer opportunity.  However, the setting will not prevent the administrator from over-filling.

Automated Email Confirmation/Reminder Emails:
VolunteerMatters will send an automated email to confirm a volunteers assignment upon self-signup.  It will also send an email remind them of the obligation in the days leading up to the event.

The description field for volunteer opportunities will allow line breaks as well as hyperlinks.  For example:  http://www.VolunteerMatters.com

</td>
<td style="vertical-align: top;padding: 1px 3px 1px 3px;border-bottom: 1pt dotted #000;"><a href="https://www.volunteermatters.net/vm/member/shift/my/ShiftView.do?shiftid=159"><img
alt="[Learn More]" src="https://www.closerware.com/images/learn_more.png"/></a></td>
</tr><tr>
<td style="vertical-align: top;padding: 1px 3px 1px 3px;border-bottom: 1pt dotted #000;white-space: nowrap;">Wednesday 04/17/2013</td>
<td style="vertical-align: top;padding: 1px 3px 1px 3px;border-bottom: 1pt dotted #000;white-space: nowrap;">9:00 AM</td>
<td style="vertical-align: top;padding: 1px 3px 1px 3px;border-bottom: 1pt dotted #000;white-space: nowrap;">4:00 PM</td>
<td style="vertical-align: top;padding: 1px 3px 1px 3px;border-bottom: 1pt dotted #000;">Sample Volunteer Calendar: Sample Volunteer Opportunity (<a href="
https://www.volunteermatters.net/vm/member/shift/my/ShiftView.do?shiftid=160">3 Open Slots</a>)</td>
<td style="vertical-align: top;padding: 1px 3px 1px 3px;border-bottom: 1pt dotted #000;width: 30em;">Overview:
You can add volunteer opportunities individually or in bulk.  Each opportunity can have a unique name, description, date, start time, end time, and maximum number of slots available for volunteers.

The max-slots will prevent volunteers who self-sign-up from over-filling a volunteer opportunity.  However, the setting will not prevent the administrator from over-filling.

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```

3. A new screen will present the html code you can copy and paste into your web page

Common Hyperlinks You May Advertise for VolunteerMatters

Each customer is assigned a customer code with their subscription. For example "The Hendrick Foundation" has a customer code of "hendrick".

Main Landing Page:
http://www.volunteermatters.com/login/{customercode}
The user will be prompted to "login" or "register". You can turn of self-registration via the System Setup Wizard. In this case, the volunteer would be prompted only to log in.

Volunteer Registration Form:
https://www.closerware.com/vm/SelfRegister.do?owner={customercode}

Monthly Volunteer Calendar:
https://www.closerware.com/vm/member/shift/my/VolunteerShiftCalendar.do?owner={customercode}

3. Report on Volunteer Information, Schedules, and History
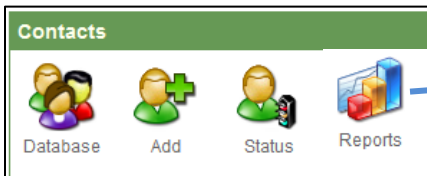
About Reports

With VolunteerMatters Standard you may run reports on contact information, volunteer schedules and volunteer history. Each time you run a report you can add a filter to further refine who or what is included in the report. For example, you can only show a roster that includes volunteers from a certain zip code (who) or only those assigned to a volunteer opportunity for being a camp counselor (what).

Run Reports

Click on the "Admin" icon

Click on the "Reports" icon

Click "Run" for the report you desire.

The description of each report contains a link for more information.

Report List

Name		Description	
Volunteer Scheduling			
Staffing Summary	run	Listing of volunteer opportunities by date with # of current and max assignments. For a samp... http://www.volunteermatters.com/sample-report-staffing-summary	
Volunteer Roster - Today	run	Volunteer schedule and assignments for today. For a sample see: http://www.volunteermatters.com/sample-report-volunteer-roster	
Volunteer Roster - ThisWeek	run	Volunteer schedule and assignments for the current week. For a sample see: http://www.volunteermatters.com/sample-report-volunteer-roster	Pdf,Html
Volunteer Roster - 7 days	run	Volunteer schedule and assignments for the next 7 days. For a sample see: http://www.volunteermatters.com/sample-report-volunteer-roster	Pdf,Html
Volunteer Roster - 30 Days	run	Volunteer schedule and assignments for the next 30 days. For a sample see: http://www.volunteermatters.com/sample-report-volunteer-roster	Pdf,Html
Volunteer Roster - 90 Days	run	Volunteer schedule and assignments for the next 90 days. For a sample see: http://www.volunteermatters.com/sample-report-volunteer-roster	Pdf,Html