Volunteer Opportunities, Occurrences and Connections

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Overview

Volunteer Opportunity Types

HandsOn Connect offers different opportunity types to meet the different ways that organizations recruit and manage volunteers.

There are two different ways of 'scheduling' volunteers:

- Date and Time Specific Opportunities
- Individually Scheduled Opportunities

Each of these two schedule types has two "Registration Type" variations, which gives us a combination of four different volunteer opportunity types

- Date & Time Specific - Full SIgn up
- Date & Time Specific - Express Interest
- Individually Scheduled - Express Interest with Schedule
- Individually Scheduled - Express Interest Only

Which opportunity type you create depends on how you want to recruit and manage volunteers.

Here are the Four Types of Volunteer Opportunities you can create. Use the correct combination of Schedule Type & Registration Type to recruit and manage volunteers for your needs:

If you prefer to see this same material presented as a video — a video is available at the end of this article.

Schedule Type = Date & Time Specific

Use this type of schedule when you need a certain number of volunteers, all of whom will be volunteering on the same date, start time and end time. You can create one or more ‘occurrences” of dates and times for this opportunity. Use this type of schedule if you need, for example, 5 volunteers on Monday from 6:00 pm - 8:00 pm, or every Monday from 6:00 - 8:00 pm.

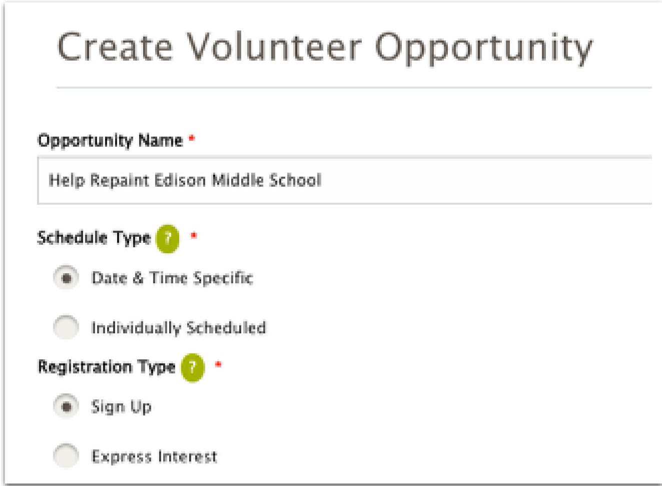
There are two Registration Types available for Date and Time Specific Opportunities:

1. **Sign up -** Used with Date and Time specific schedule to automatically sign up and confirm any volunteer who meets the opportunity requirements (such as minimum age, background

check required, etc). If they do not meet the restrictions, they will not be able to sign up and will receive a message saying what restrictions they have not met. When the maximum attendance for the date's occurrence is reached, volunteers have the option of joining the waitlist for that opportunity, or signing up for a different date and time of the same opportunity if it's available.

2. **Express Interest** - Used with Date and Time specific schedule, this registration type allows volunteer to express interest in that occurrence, but they are not automatically confirmed. The opportunity coordinator must then review and either confirm or decline that volunteer to participate. This registration type is useful if you need to do background checks, wish to interview your volunteers or go through other processes before confirming a volunteer to participate.

   The volunteers initially sees the upcoming opportunity as 'pending' - and when they are confirmed for the opportunity they receive an email notification that they have been confirmed. (It's also possible to decline a volunteer if they are unsuitable for the opportunity).



Schedule Type = Individually Scheduled

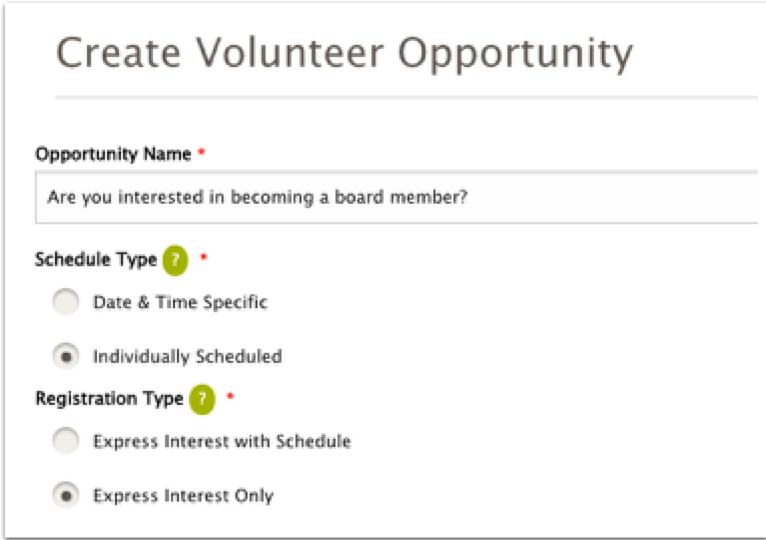
Use this type of schedule when you have a flexible schedule of when you need volunteers, and each volunteer may be scheduled to attend at a different date and time over an extended time period. Each volunteer for this opportunity can be scheduled to attend on a different date and time based on their availability. Volunteers can express interest for this opportunity as often as they like making this ideal for ongoing volunteers when scheduling can be flexible. This schedule type can also be used when you simply want volunteers to express interest, without having to specify when or where the volunteer activity will take place.

There are two Registration Types available for Individually Scheduled Opportunities

3. Express Interest with Schedule - You define a schedule of times when volunteers are needed (i.e. Mondays 9 - 5 and Fridays 9 - 12) on an ongoing basis or to a specified 'end date'. Volunteers can then express interest in the opportunity and propose one or more times they are available to attend within the schedule youve defined. The opportunity coordinator then simply confirms the volunteer if they approve the date(s) and time(s) they wish to volunteer.

This allows significant flexibility in scheduling individual volunteers and works well for ongoing commitments to volunteer.   Opportunity Coordinators can also administratively schedule volunteers for one or more date & times for this ongoing opportunity.

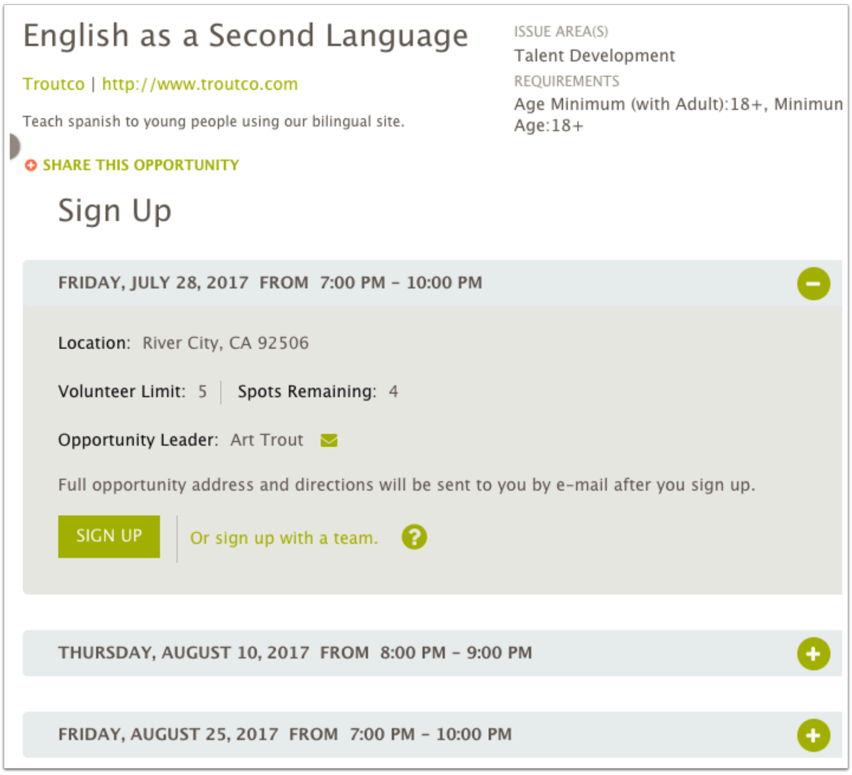
4. **Express Interest Only -** Use this schedule type when you simply want to allow a volunteer to express interest in an opportunity, without proposing when they will volunteer. Opportunities of this type do not require a location for the opportunity so it works well for virtual opportunities or expressing interest in receiving further information, joining a committee that doesn't yet have a schedule of meetings, etc.   There is no need to confirm or schedule interested volunteers, though you can choose to do so administratively if you wish. This simply generates a list of interested volunteers and what you choose to do with this information is up to you. Volunteer merely express interest, and do not see it as an 'upcoming opportunity' unless you elect to schedule them for a specific time and place to volunteer.



Examples: How the different opportunity types appear to volunteers on the pubic site:

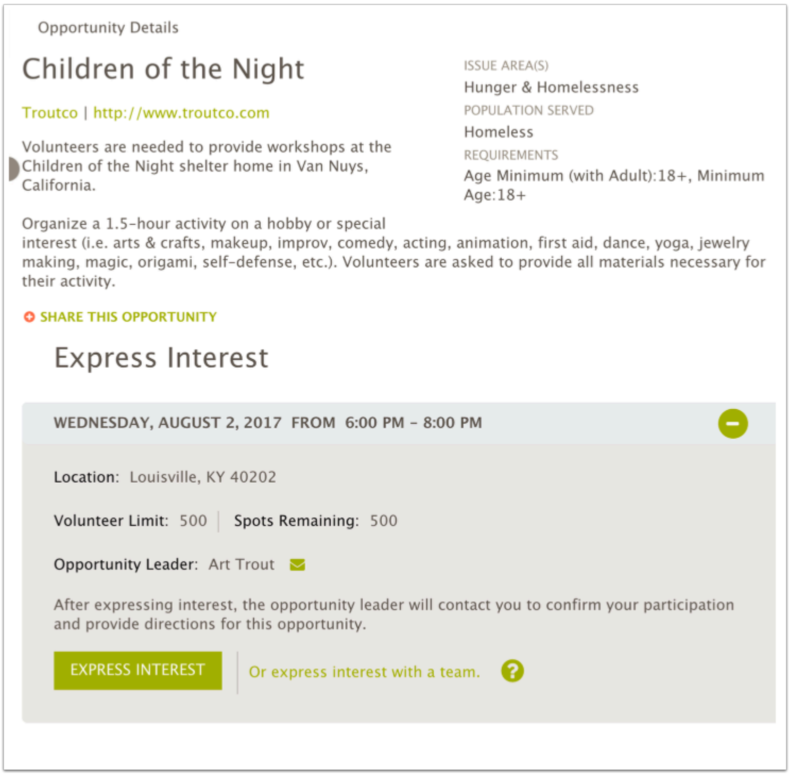
Date & Time Specific - Full SignUp:

Multiple dates and times (occurrences) are shown -- the volunteer sees a 'Sign Up' button. if the opportunity is full, they see a button to join the waiting list.



Date & Time Specific - Express Interest

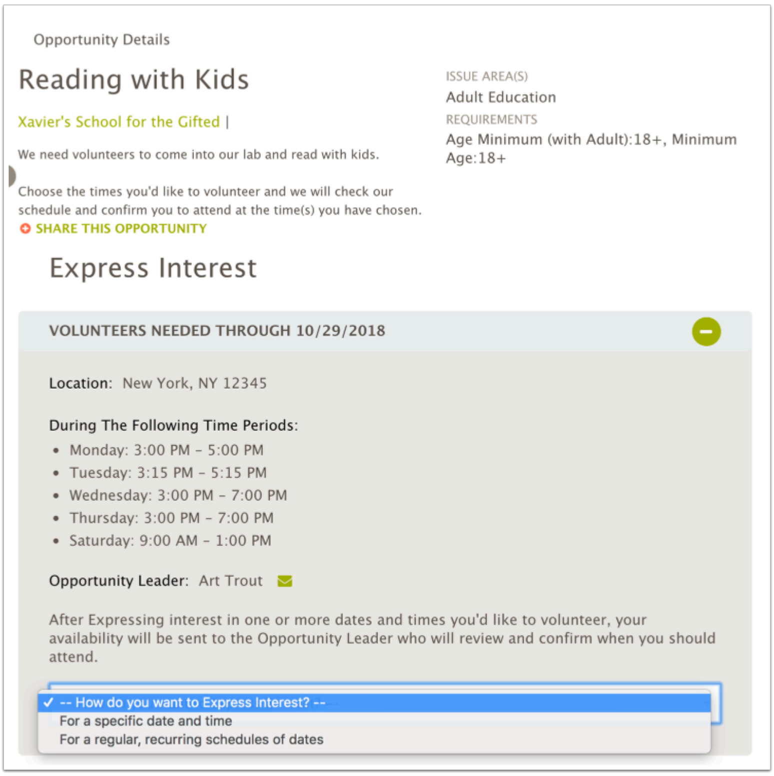
Multiple dates and times (occurrences) are shown -- volunteer sees 'express interest' button



Individually Scheduled - Express Interest with Schedule

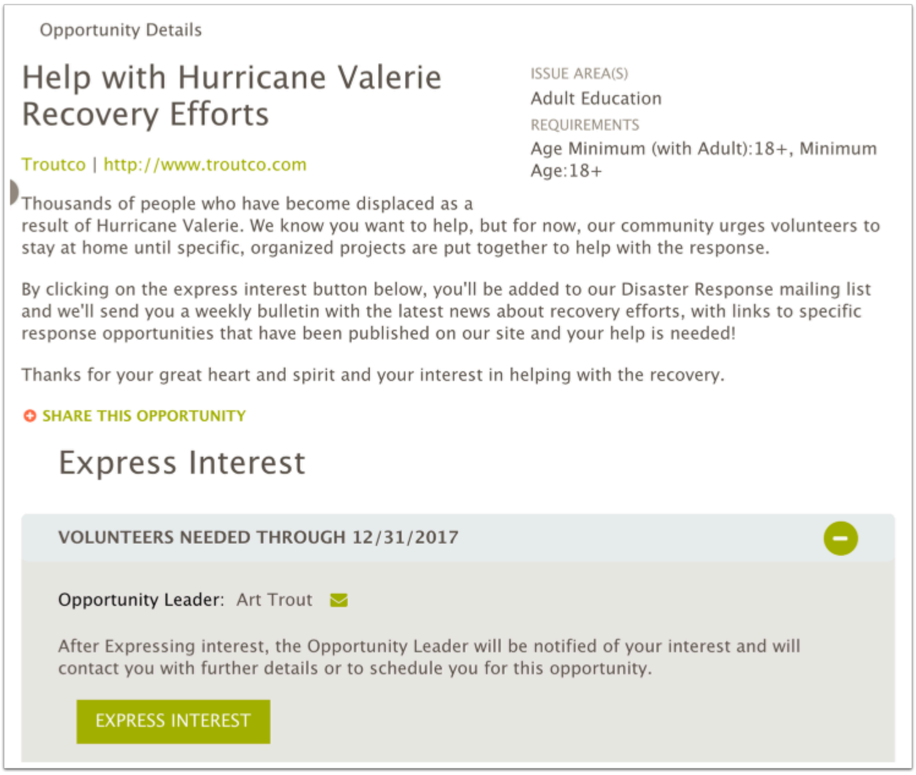
The time period volunteers are needed is displayed, and Volunteer can 'express interest". Upon clicking on the Express Interest button, they can express interest in one or more dates & times they're interested in volunteering.

The Opportunity Coordinator can then review the dates they've expressed interest in volunteering, and confirm or decline them. (They also have the option of rescheduling the volunteer for one or more dates if desired).



Individually Scheduled - Express Interest Only

The description gives the details and tells the volunteer what to expect. The volunteer can express interest, but does not schedule themselves. The opportunity may or may not have a location.



Video: Volunteer Opportunity Types

Start watching this video at 1:53 in the video timeline.

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Additional Options for Volunteer Opportunities

After creating a volunteer opportunity, administrators have access to a number of other options that can be associated with a volunteer opportunity.

The following additional items can be configured for Volunteer Opportunities:

- **Restrictions** (some restrictions, but not all, can be made available in the sharing portal)

Sets parameters on requirements necessary for signing up or expressing interest in a volunteer opportunitty

- **Skills** (Not generally available in the sharing portal)

Skills can be associated with Volunteer Opportunities for search functionality. Its also possible to make skills required which makes the skill function as a restriction to opportunity signup.

- **Volunteer Events (**SF only - not available in sharing portal)

Volunteer Opportunities can be 'grouped' as part of a larger event by associating them with a Volunteer Event. When a volunteer opportunity is part of an event, a special event page is created and the EVENT is listed on the opportunity calendar instead of its individual opportunities.

- **Private Opportunities (Invitation Codes) (**SF only - not available in sharing portal)

Invitation codes can be associated to an opportunity in order to make an opportunity 'private'. Private opportunities only show up if you enter the invitation code on the search page or on a company's "Business Page"

Note: Invitation codes can optionally be used for a volunteer event (which would include all volunteer opportunities that are part of the event), or at the Occurrence Level (if you only want specific occurrences of a Volunteer Opportunity to require an invitation code.

For information on adding invitation codes to Volunteer Events or Occurrences see Release Notes, October 2019

- **Custom Questions (**SF only - not available in sharing portal)

Custom questions allow the capturing of additional information during the opportunity sign-up / express interest process. Custom questions can be added for Date & Time Specific Opportunities, and Individually Scheduled - Express Interest Only Opportunities.

- **Prerequisites -** (SF only - not available in the sharing portal)

Prerequisites allow you to require a volunteer to have attended or to sign up for another volunteer opportunity in order to sign up for an opportunity. This can be used if you wish to require a training or orientation opportunity to be attended in order to volunteer for an opportunity that requires this training as a prerequisite.

- **Grouped Occurrences -** (SF only - not available in the sharing portal).

You can choose to 'group' occurrences of date and time specific opportunities so that signing up for one date of the opportunity automatically signs you up for multiple dates.

Video demonstration of these additional Options

Start viewing this video at 1:08

Creating a Volunteer Opportunity

Create a Volunteer Opportunity (Date and Time Specific)

Volunteer Opportunities are always created using the Volunteer Opportunity Wizard.

- In SF classic the wizard is accessed through the Create Volunteer Opportunity link in the "Create Volunteer Opportunity" widget on the left sidebar of the page.
- In SF lightning you'll find the wizard in the utility bar at the bottom left of each page.
- Clicking on "New" in a volunteer opportunity record will also launch the wizard.

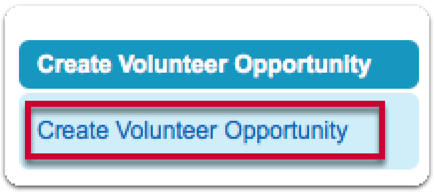
In this step-by-step flow, you'll be able to create all required elements of a volunteer opportunity, as well as one or more occurrences (dates / times / location) that the opportunity takes place.

NOTE: The flow for creating volunteer opportunities can be customized to include additional fields of information, so your version may have more or fewer or more fields than in the documentation below. Contact HandsOn Connect support for pricing information if you wish to have your flow customized in any way.

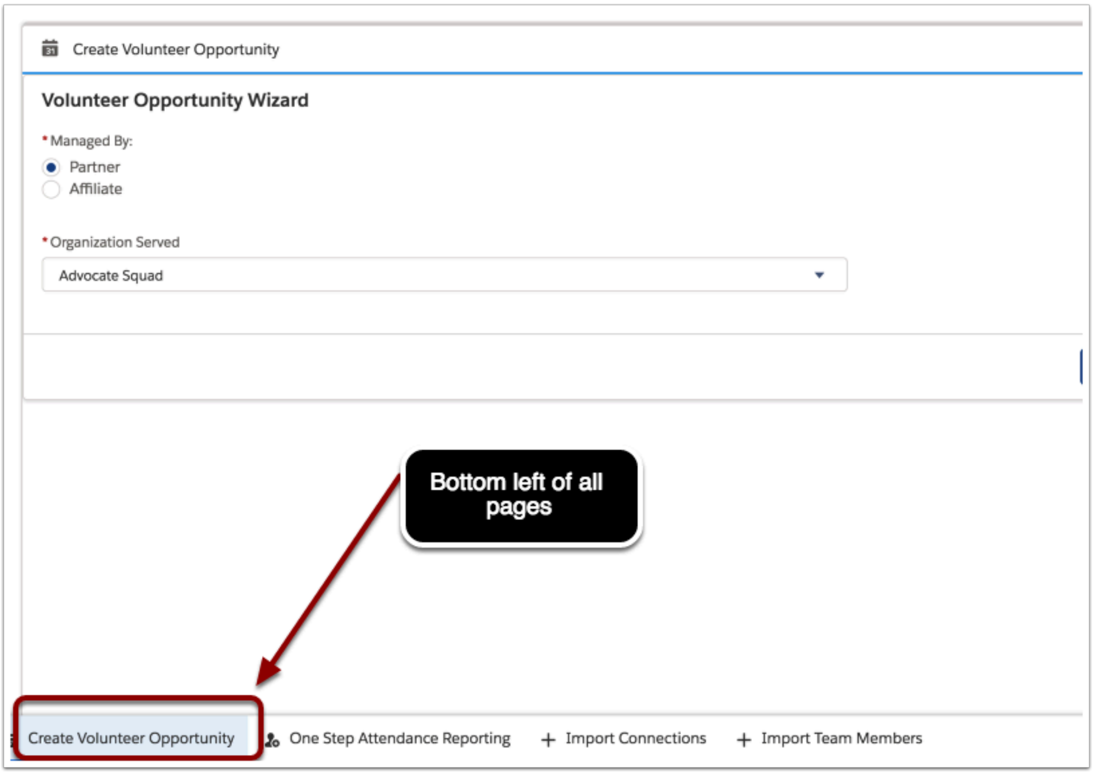
NOTE: The steps for creating a volunteer opportunity are the same whether you are in Salesforce Classic or Salesforce Lightning. Some of the screenshots below are from the classic version of the wizard, and some are from lightning. The contents will be the same in both environments.

Click on the Create Volunteer Opportunity Link (SF Classic)

Clicking on this link will open a 'flow' that will take you step-by-step through creating a volunteer opportunity.



Click on "Create Volunteer Opportunity" in the utility bar (SF Lightning)



Define who is Managing the opportunity

1. Select who is Managing the Volunteer Opportunity:

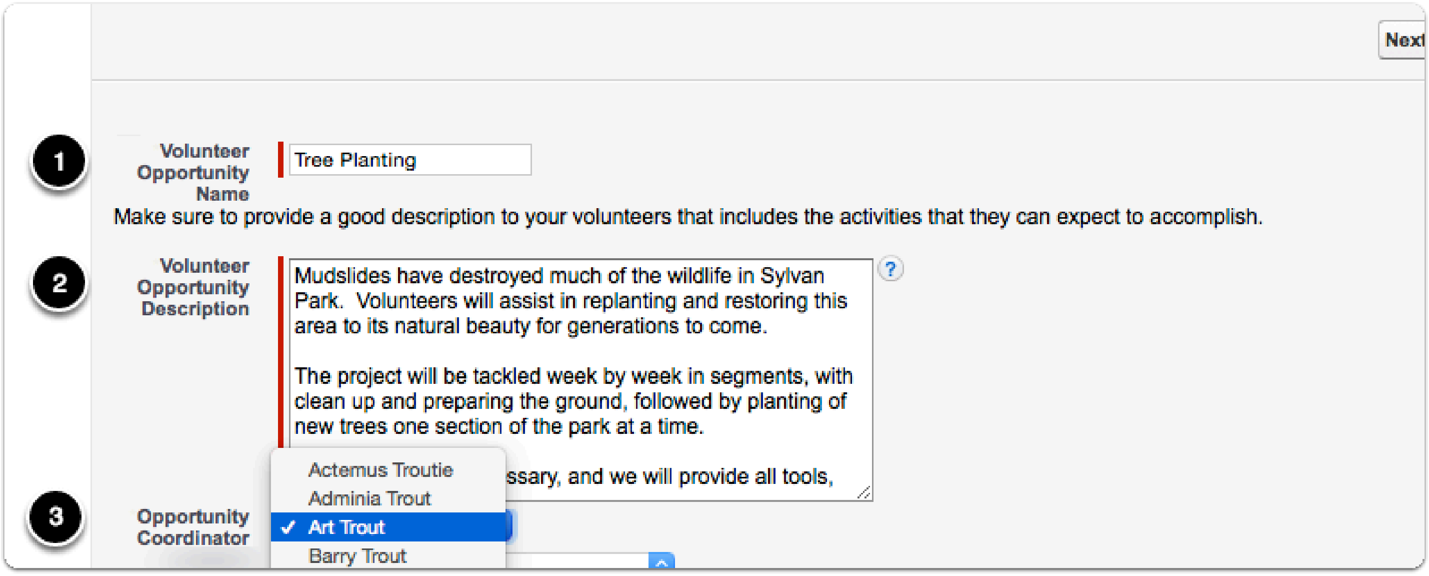
Partner: means that one of your partner organizations is managing the volunteers. These will usually be created in the partner portal by your partners themselves, but this option allows you to administratively create a partner-managed opportunity on their behalf.

Affiliate: means that YOUR organization will be managing the opportunity on behalf of one of your partners (either your staff or volunteer leaders will be managing the project and its volunteers)

2. **Organization Served.** All organizations in status "Active Partner" will appear in this picklist alphabetically. Choose the partner who will either be managing the project, or, in the case of an affiliate-managed opportunity, the organization that will receive the volunteer service.

3. Click the next button.

Define the Volunteer Opportunity

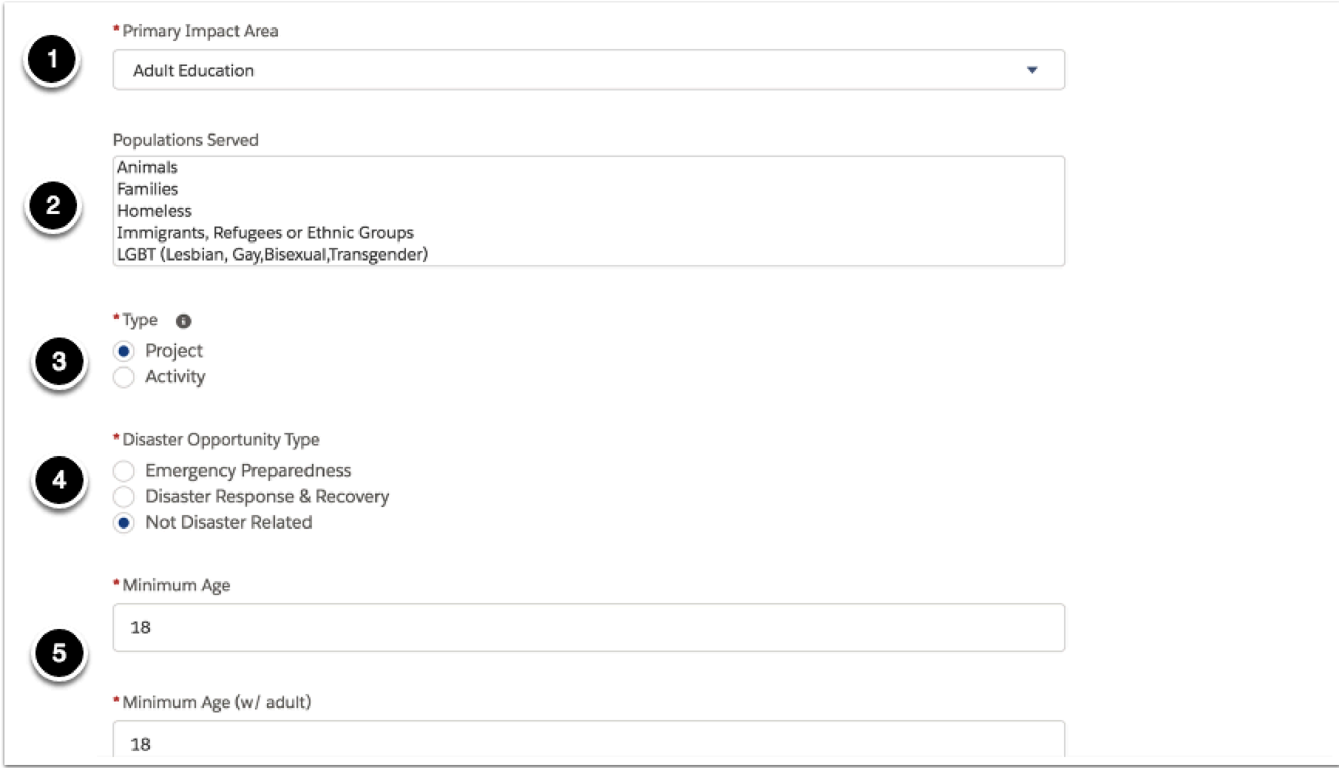


1. Give the Volunteer Opportunity a Descriptive Name

2. Describe in detail what the project is about and as much information as possible about what volunteers will do. (This will be a 'text' description - but you can optionally add hyperlinks, photos, and styles to the description after the opportunity is created and before you publish it. To do this you will click on the "Add/Change Description" link in the Volunteer Opportunity overview AFTER the opportunity has been created.

3. **Opportunity Coordinator:** This is the person who will be in charge of managing the volunteers at this project. They will receive emails notifying them of volunteer signups and removals, and will be listed on the public site as the contact for this opportunity. For partner projects the picklist will indicate all valid contacts related to that organization. For affiliate managed opportunities, the list will include your staff, your organization's volunteer leaders, and the partner organization's contacts who have partner portal access.

Define the Volunteer Opportunity (continued)



1. **Primary Impact Area:** Choose one from the drop down list.

2. **Populations Served**: (optional). Choose one or more populations that benefit from the service, and click on the right facing arrow to move them to the 'chosen' list. The chosen list can remain blank if desired.

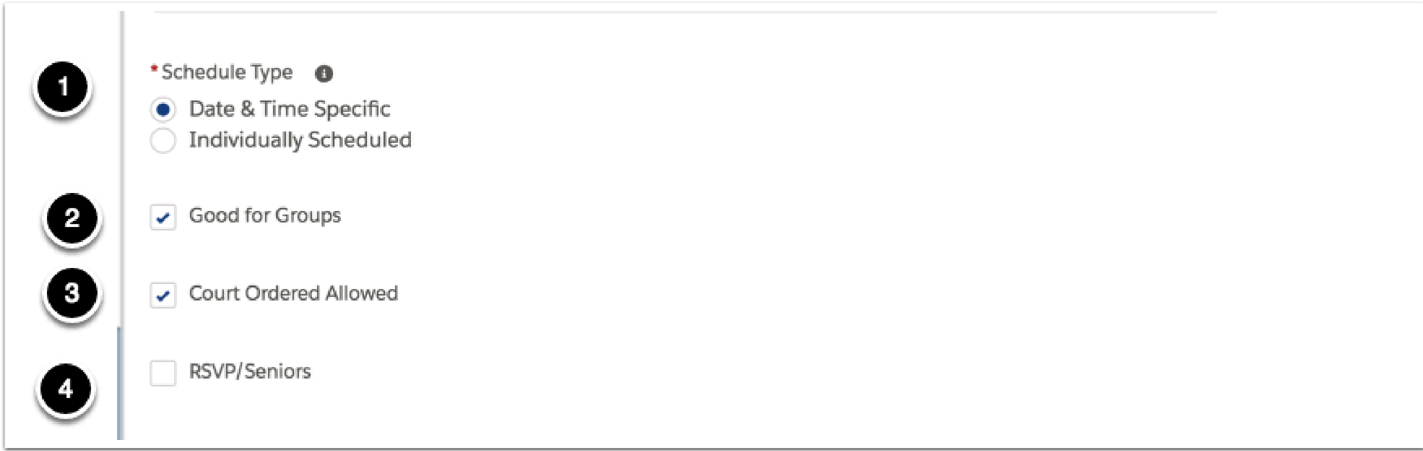
3. Type: Project or Activity - A project is a volunteer opportunity that will result in service hours. An Activity is any other opportunity you may which to make available to volunteers such as recognition events, trainings, social, etc. If you choose Activity you will be presented with another screen subsequently asking additional definitions of the type of activity you are creating.

4. **Disaster Opportunity Type:** By default, "Not Disaster Related" is selected for you. However if you wish to designate the opportunity as an emergency preparedness or Disaster Response & Recovery related opportunity you can do so.

5. **Minimum Age** -- what is the youngest age where a volunteer could attend on their own. (If under 18 you can ask they bring a parental consent, but the parent doesn't need to accompany them)

Minimum Age (W/ adult) -- to encourage family volunteering -- we'd like you to set the youngest age where a minor could attend this volunteer opportunity while accompanied by an adult, parent or guardian. (An adult can then create a Family Team - and then sign up anyone who meets the minimum age w/adult threshold. Those younger than the minimum age will NOT be able to sign up on their own.

Defining the Opportunity (Continued)



1. **Schedule Type:**

Date and Time Specific - This is intended as an opportunity where you need a certain number of volunteers to attend and volunteer together. It takes place on a specific day with everyone starting at the same time and the opportunity ends at a defined time. This could happen just one time, or on a recurring basis (weekly, monthly, etc). You define how MANY volunteers can sign up for this opportunity, and they will see exactly when they are scheduled to attend.

Individually Scheduled - Some organizations need volunteers on an ongoing basis, and are happy to arrange the time and duration for each volunteer to fit their schedule. Examples might be "Office help needed" or "Mentors or Tutors needed". You might welcome volunteers at defined times of the day, (i.e. Mondays - Fridays anytime from noon - 5 pm)... but exactly when the volunteer will attend, and for how long, is flexible and something you will schedule directly with the volunteer. If you need volunteers every day -- this is the preferred schedule type (as opposed to creating many, many date and time specific opportunities). See this next article for information on how to create "Individually Scheduled Opportunities. For the rest of this walk-through - we'll focus on creating date and time specific opportunities, but you must choose one or the other schedule type as part of creating an opportunity.

In this example we are going to create a Date and Time Specific Opportunity!

2. Good For Groups - check this box if the opportunity is good for groups to participate in.

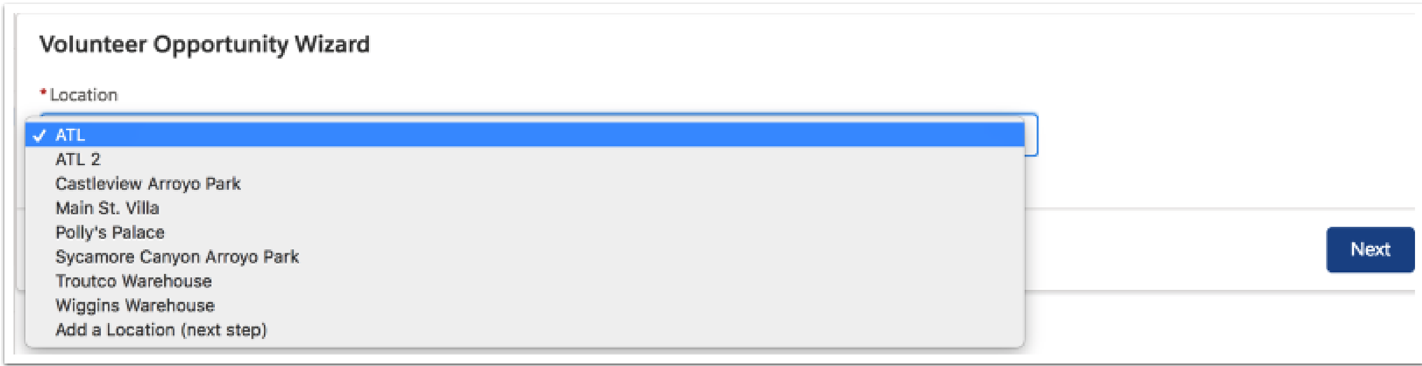
3. Court Ordered Allowed - check this box if you are running a court-ordered program and designating which opportunities court-ordered volunteer CAN volunteer for.

4. RSVP/ Seniors - If you are running an RSVP program, or want to flag in search certain projects as being well-suited to seniors - check this box.

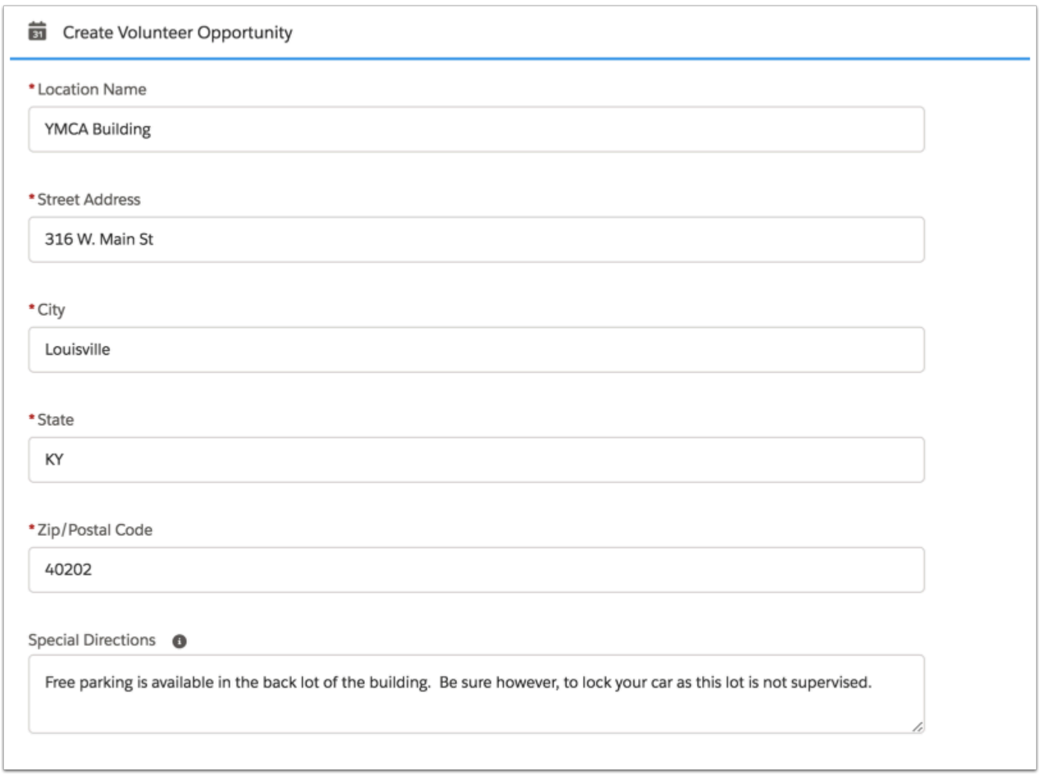
Click the NEXT button to continue.

Location Screen

1. **Location:** A picklist of all locations used for Volunteer Opportunities by the managing organization is available to choose from. If the location doesn't already exist, the last item on the picklist should be chosen "Add a Location (next step)" - which will allow you to create a new Location for this Volunteer Opportunity



If you select 'Add a location' you'll be prompted to fill in the location details in the next screen:

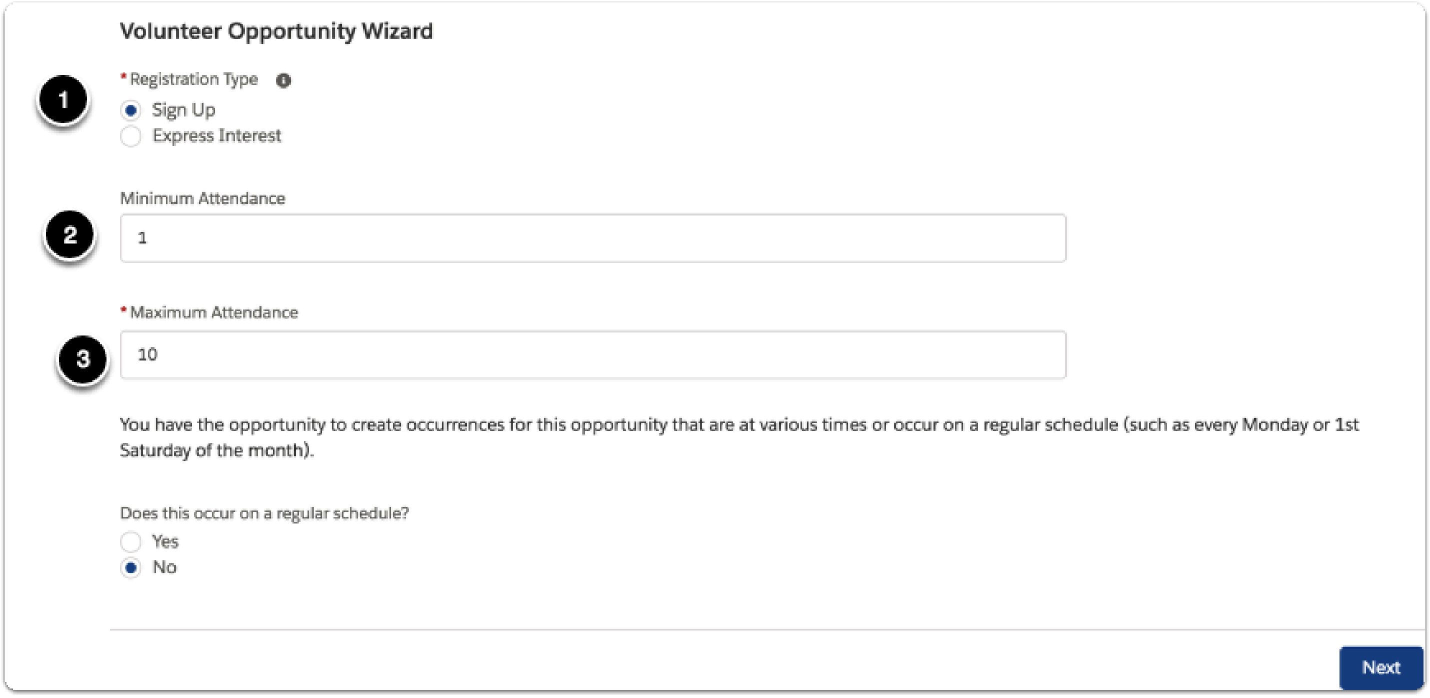


The location screen only appears IF you choose "Add a location" in step 1 above. Give the location a recognizable name for future reference and put in the address information. The **Special Directions** field is optional and can be used to include parking directions and other descriptive info.

(No need to put in a link to a map, a google map will automatically be created and published for the location)

Registration Type and occurrence defaults

Depending on the schedule type you chose earlier - you'll be prompted for defining the Registration Type.



1. **Registration Type:**

There are two registration types to choose from:

- **Sign Up** - Sign-up registrations are ideal for date & time specific opportunities. You specify how many volunteers you need, and volunteer can simply sign-up and commit to attend on that date and time. The volunteer is automatically confirmed and receives automatic notification via email that they are scheduled to attend.   When all slots are gone, sign-up is cut-off (though people have the option of being added to a waiting list, which will automatically alert them if volunteers cancel and space becomes available!)
- **Express Interest --** Choose this registration type if you want to review the volunteer before confirming them for the opportunity. They will not be able to automatically sign-up, but will just express interest. The opportunity coordinator will then receive email notification whenever a volunteer expresses interest -- and will have to log-in and either CONFIRM or DECLINE the volunteer for the opportunity.   All "To Be Scheduled" opportunities are

automatically set to 'express interest' since you'll have to contact the volunteer to arrange for a specific date and time for them to volunteer with you.

For more information on the different combinations of Schedule Type and Registration Type see this article on the 4 different types of volunteer opportunities that can be created in the wizard.

2, **Minimum Attendance** is automatically set to 1. This is used for internal reference only and can be set to any value. **Maximum Attendance** appears only for date and time specific opportunities. This determines how many people are allowed to sign up or express interest before the project is marked as 'full'. (At that point, volunteers can choose to be added to a waiting list)

3. **Does this occur on a regular schedule.** If you select "no" you will have the opportunity to create one or more individual occurrences (dates and times) when the opportunity will take place. If you select "yes" you will be led through steps to create a series of occurrences that take place in a regular pattern (weekly, monthly, etc.)

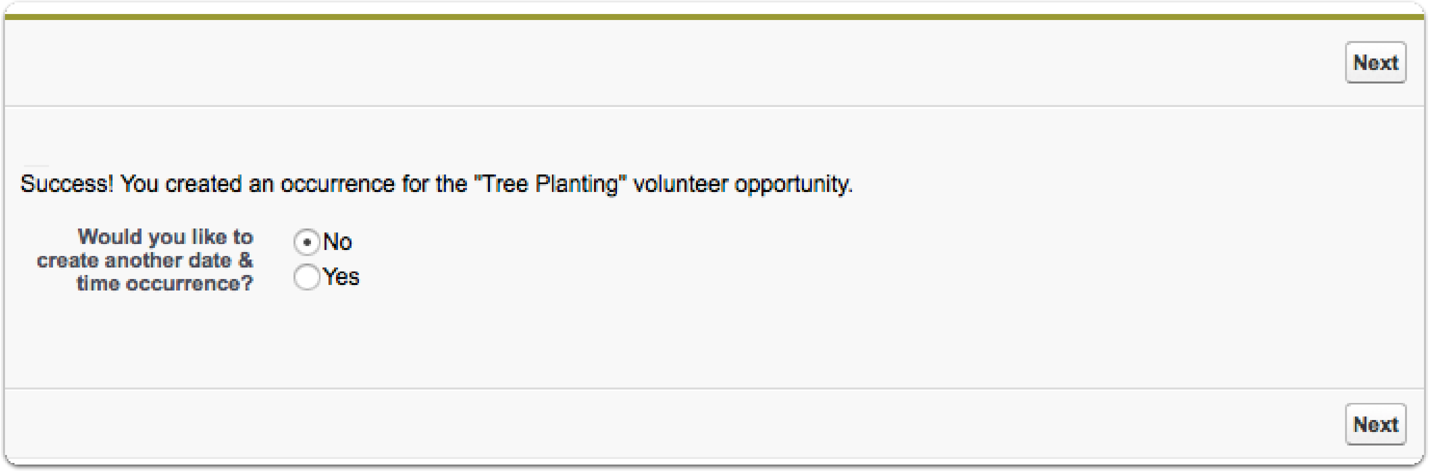
We'll select "No" here. but see further down for the steps if "Yes" is selected.

Click Next.

When does the occurrence take place?

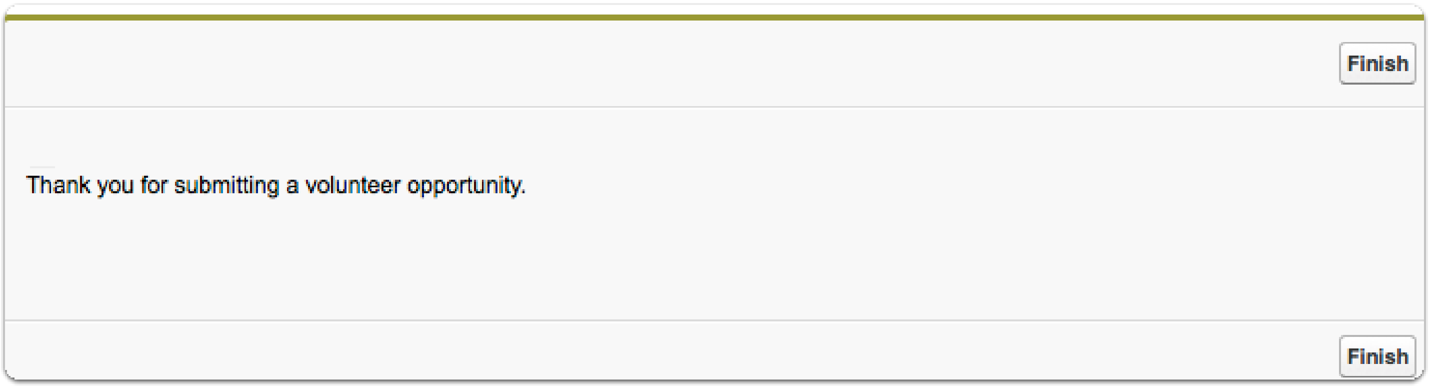
When you click on the Date field - a popup calendar will appear allowing you to select the date. Choose a start time and and end time from the drop down picklists. Click NEXT.

Occurrence 'success' screen



You'll see that your occurrence has been created, and now have the option to create and date & time occurrence if you wish. Selecting yes will let you enter another date and time for this opportunity. You can create as many occurrences as you wish by saying YES after each occurrence. When you have no more to create, select NO and click NEXT.

Thank you Page

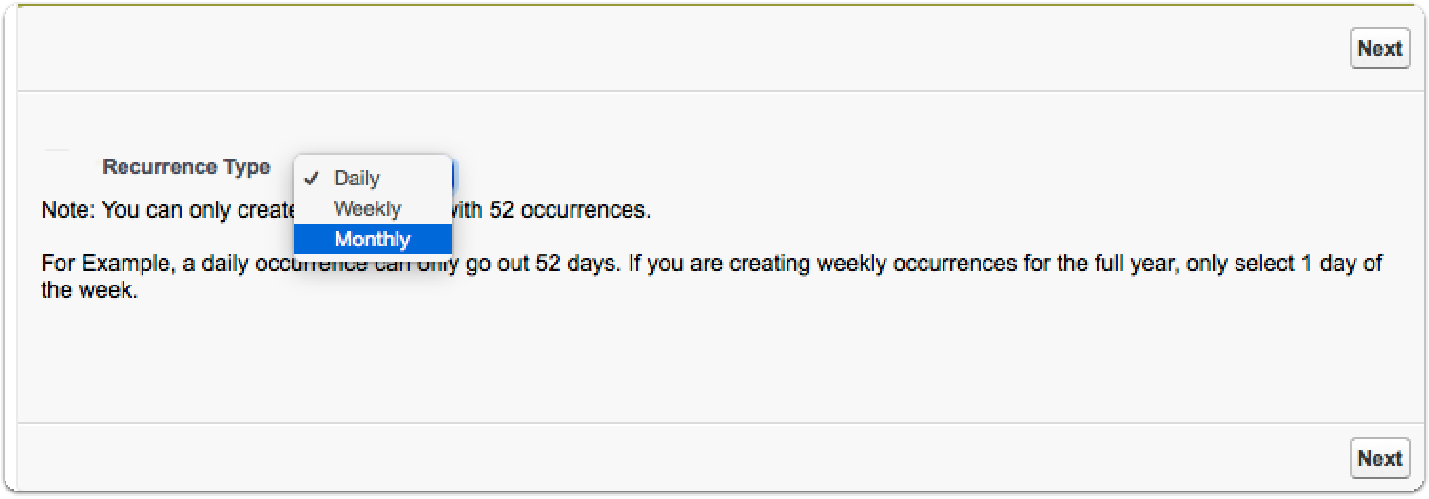


This ends the flow. Now click "Finish". You can then go to the Volunteer Opportunity Tab and look at the most recently created Opportunity record. From there you can optionally customize the opportunity description (as described above), add related skills, and add custom questions. The opportunity will not be published until you review and publish the opportunity.

The flow if you selected "Yes" to the question "Does this occur on a regular schedule"

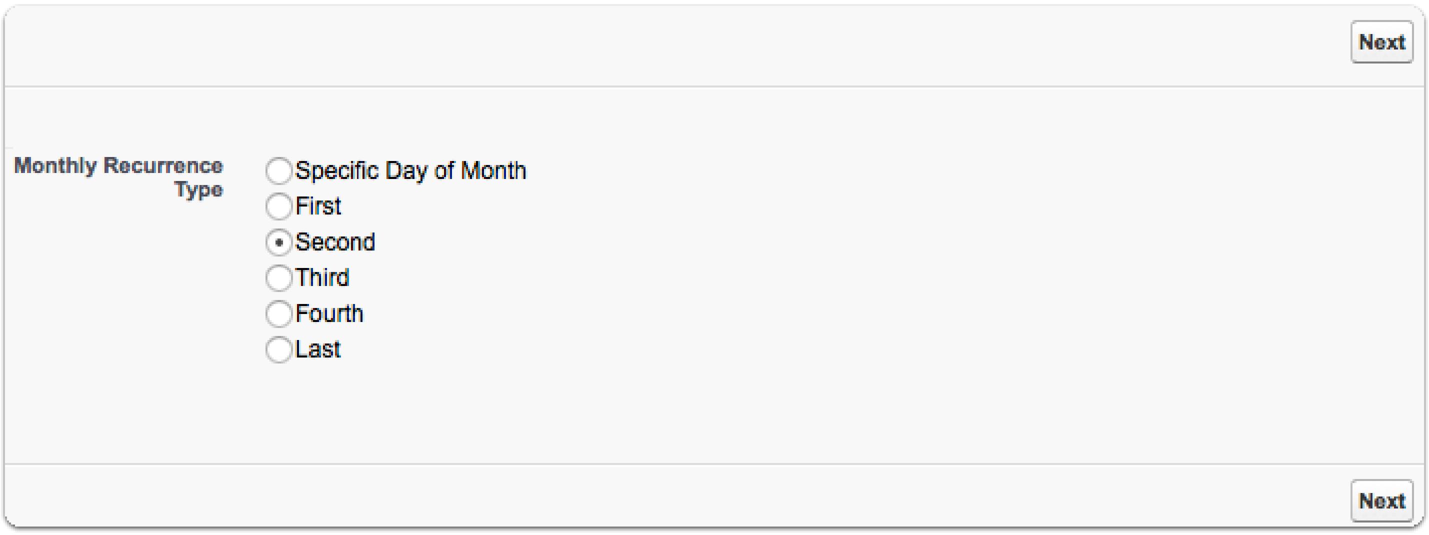
If you choose Yes when asked "Does this occur on a regular schedule" you are guided through the steps to create a recurrence.

The recurrence flow

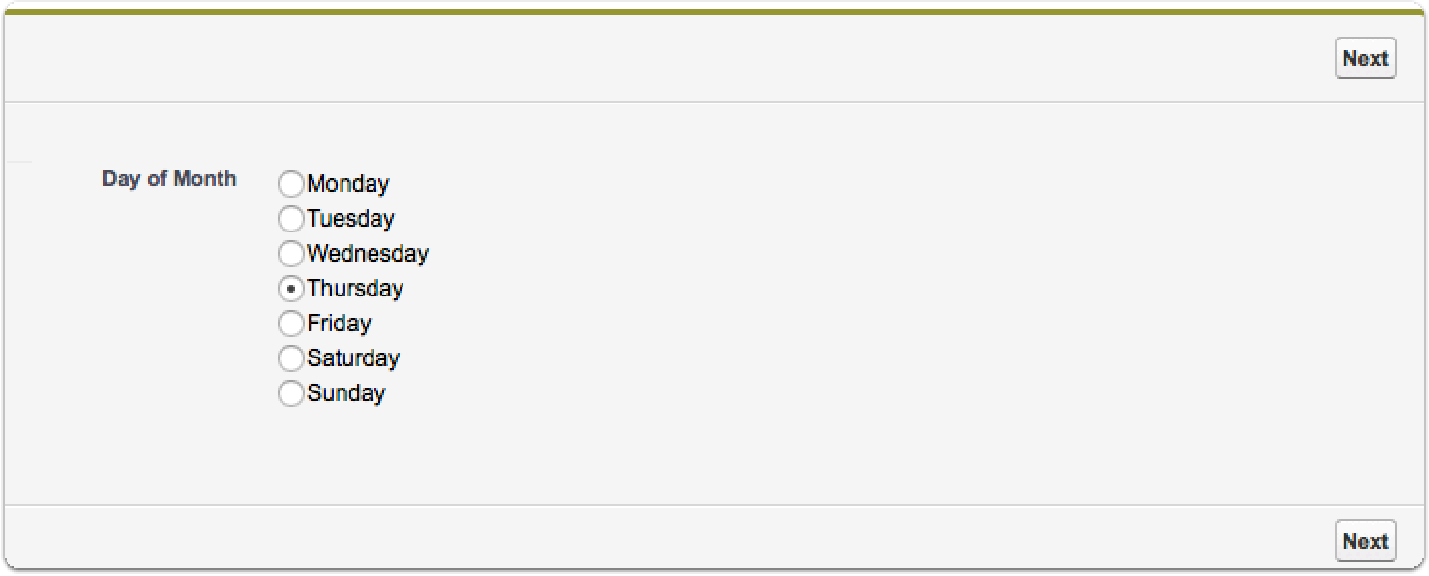


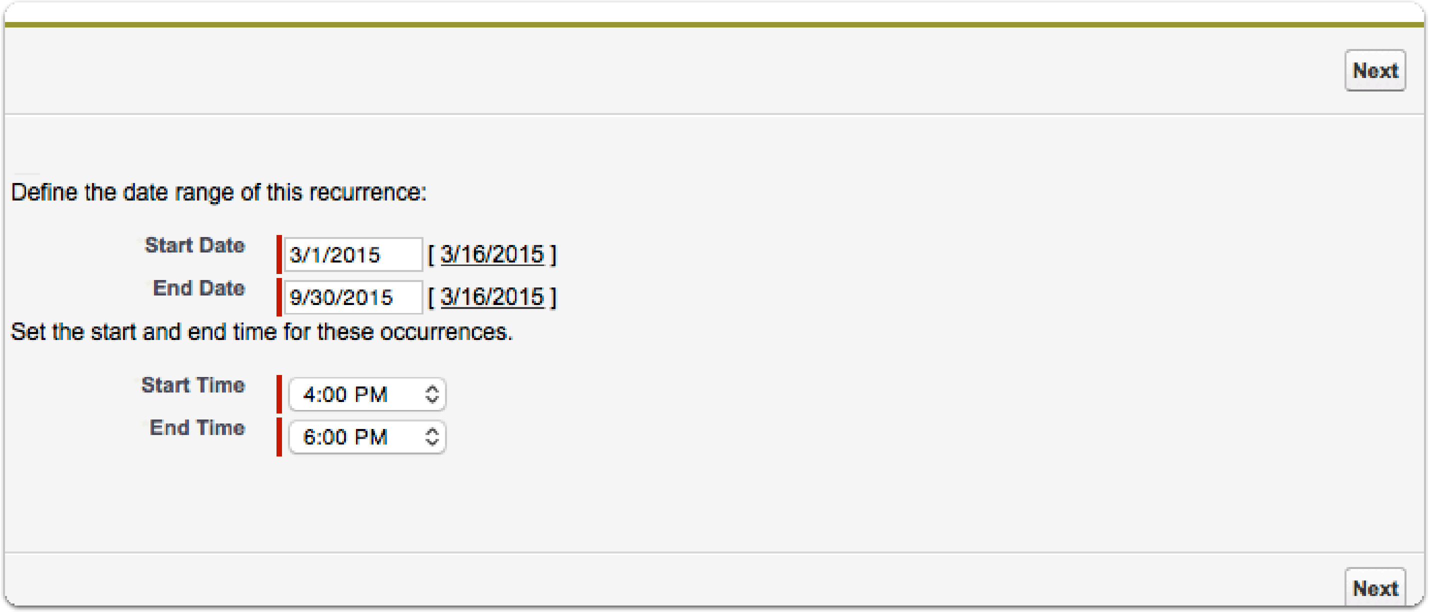
A recurrence can take place Daily, Weekly or Monthly. After making this selection and clicking on NEXT you'll be asked to define the schedule of the recurrence.

Note: Do not create recurrences that have more than 52 dates or it will produce an error. Only 52 occurrences can be created at one time in a recurrence.



follow the steps to define the pattern of your recurrence.





In this example, we have created occurrences that take place on the 2nd Thursday or every month from March to September (a total of 7 individual occurrences, all created through one step!) After you click NEXT. you'll reach the Finish screen!

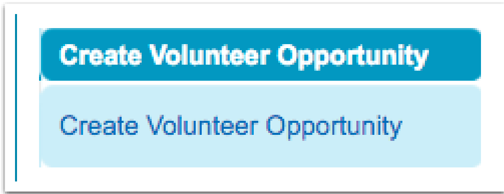
Creating Individually Scheduled Volunteer Opportunities

Always determine the best schedule type before creating a volunteer opportunity. [See this article for information on the distinction between Individually Scheduled Opportunities (ISO) and Date & Time Specific Opportunities. (D&T)]

For information on how to Start creating a volunteer opportunity, see the introduction to the article "Create a Volunteer Opportunity (Date and Time Specific)"

Creating an Individual Scheduled Opportunity (ISO)

Use the "Create Volunteer Opportunity" link in the left sidebar to create a new volunteer opportunity (classic), or the "Create Volunteer Opportunity" in the utility bar (SF Lightning)



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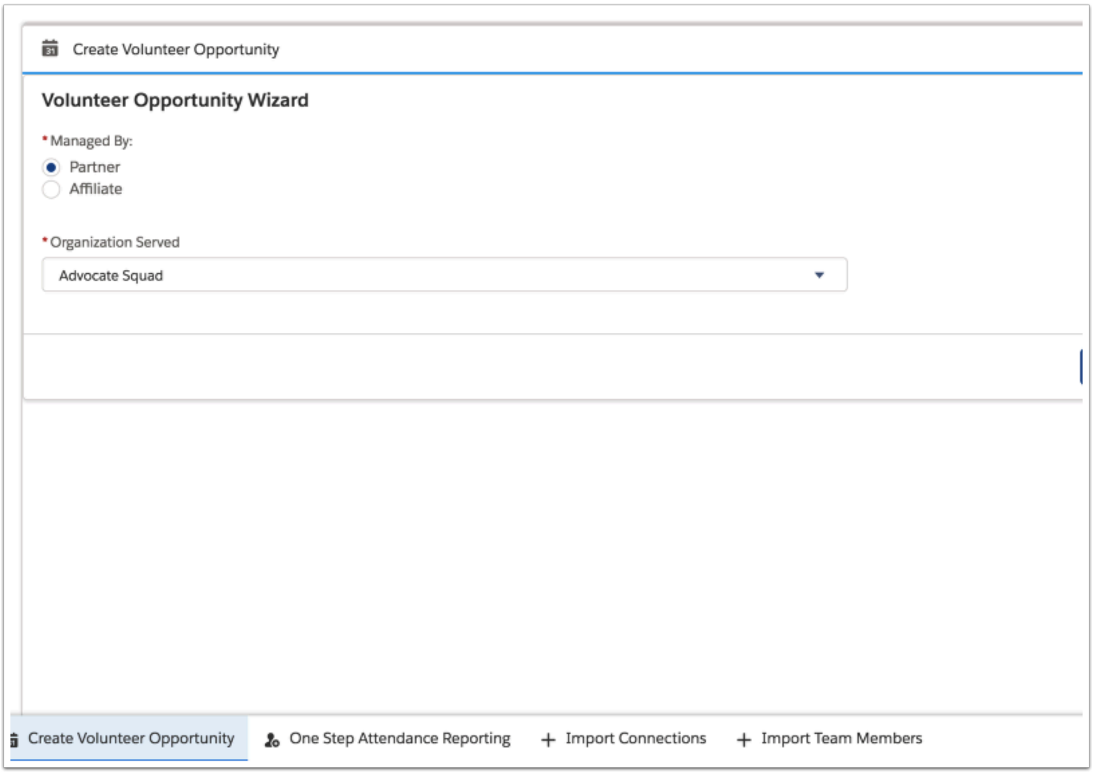
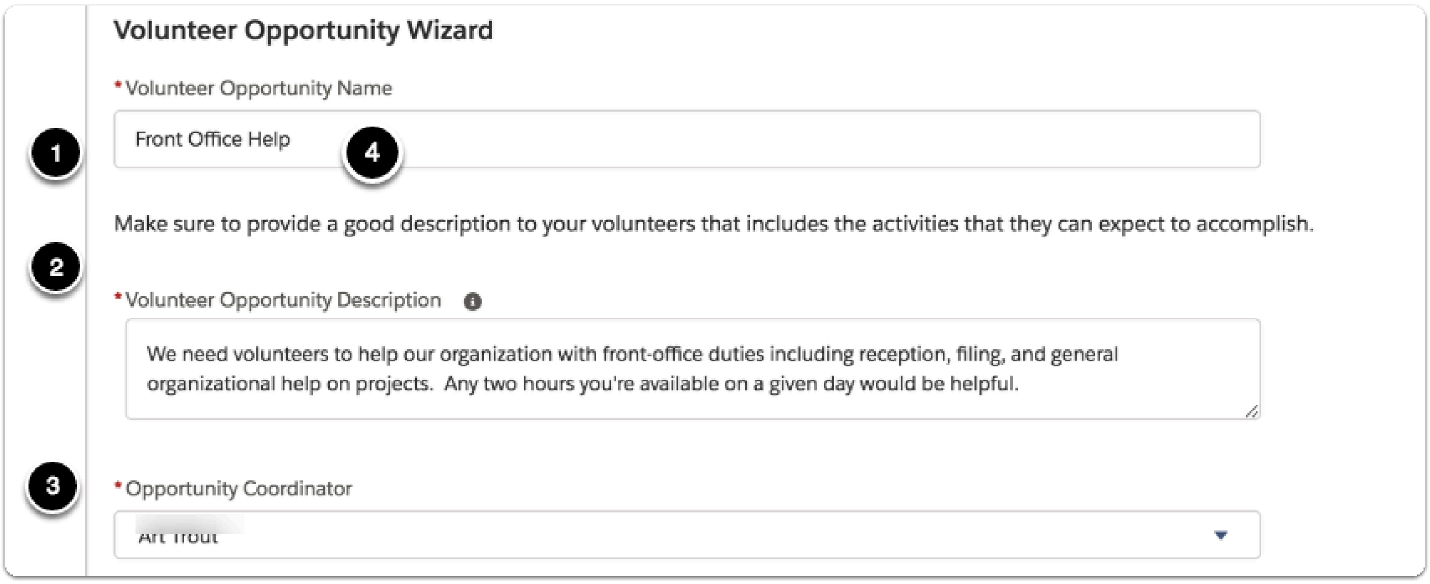


Define the Volunteer Opportunity



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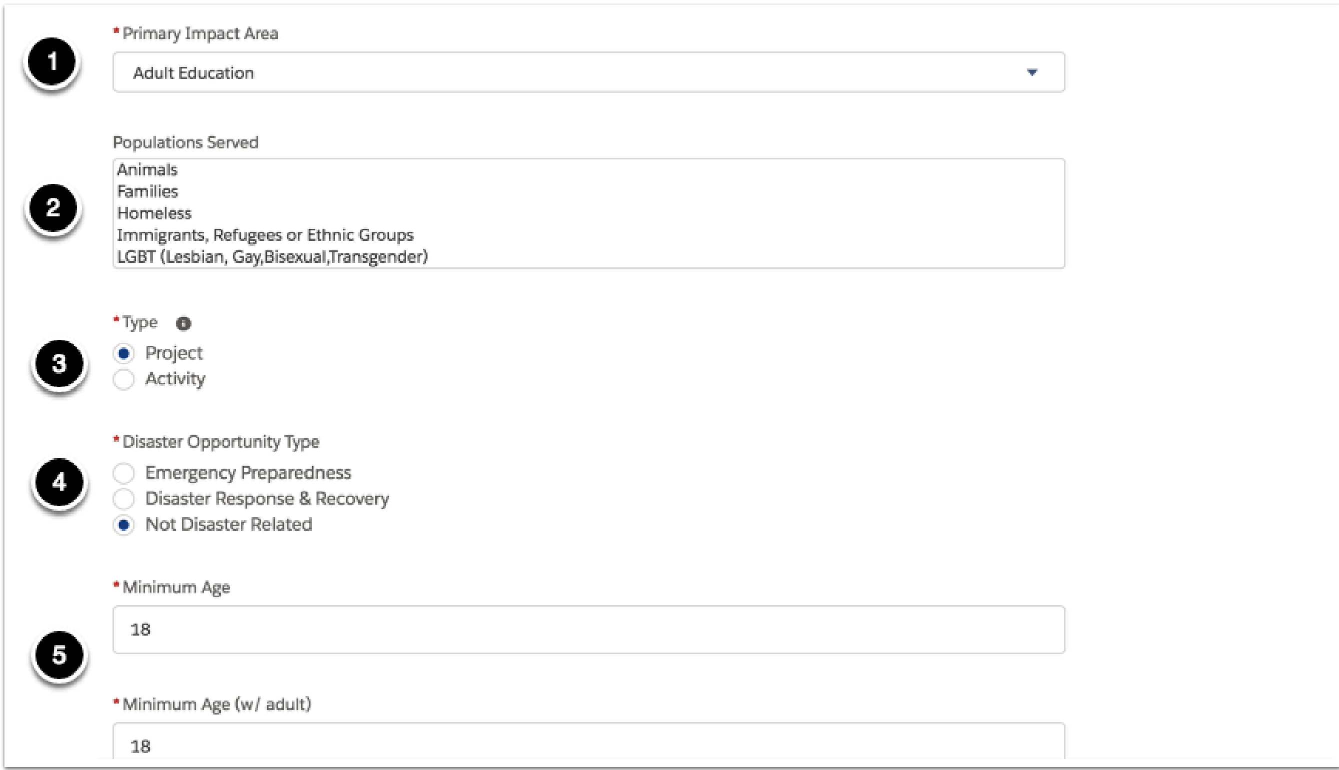

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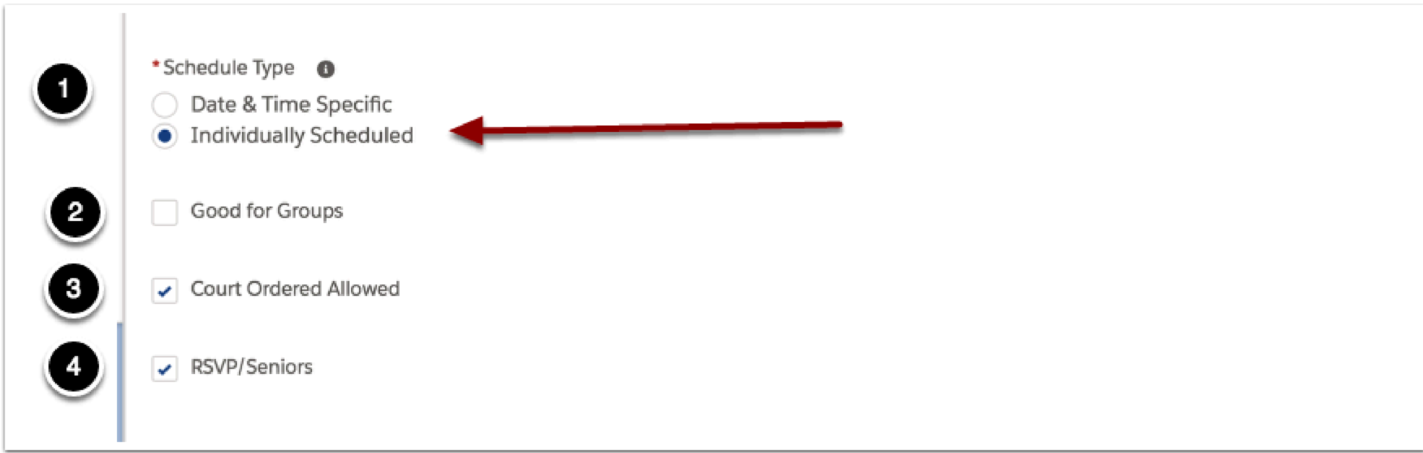
Defining the Opportunity (Continued)



1. **Schedule Type:**

Date and Time Specific - This is intended as an opportunity where you need a certain number of volunteers to attend and volunteer together. It takes place on a specific day with everyone starting at the same time and the opportunity ends at a defined time. This could happen just one time, or on a recurring basis (weekly, monthly, etc). You define how MANY volunteers can sign up for this opportunity, and they will see exactly when they are scheduled to attend.

Individually Scheduled - Some organizations need volunteers on an ongoing basis, and are happy to arrange the time and duration for each volunteer to fit their schedule. Examples might be "Office help needed" or "Mentors or Tutors needed". You might welcome volunteers at defined times of the day, (i.e. Mondays - Fridays anytime from noon - 5 pm)... but exactly when the volunteer will attend, and for how long, is flexible and something you will schedule directly with the volunteer.   If you need volunteers every day -- this is the preferred schedule type (as opposed to creating many, many date and time specific opportunities).   See this next article for information on how to create "Individually Scheduled Opportunities. For the rest of this walk-through - we'll focus on creating date and time specific opportunities, but you must choose one or the other schedule type as part of creating an opportunity.

In this example - we're going to create an Individually Scheduled Opportunity.

2. Good For Groups - check this box if the opportunity is good for groups to participate in.

3. Court Ordered Allowed - check this box if you are running a court-ordered program and designating which opportunities court-ordered volunteer CAN volunteer for.

4. RSVP/ Seniors - If you are running an RSVP program, or want to flag in search certain projects as being well-suited to seniors - check this box.

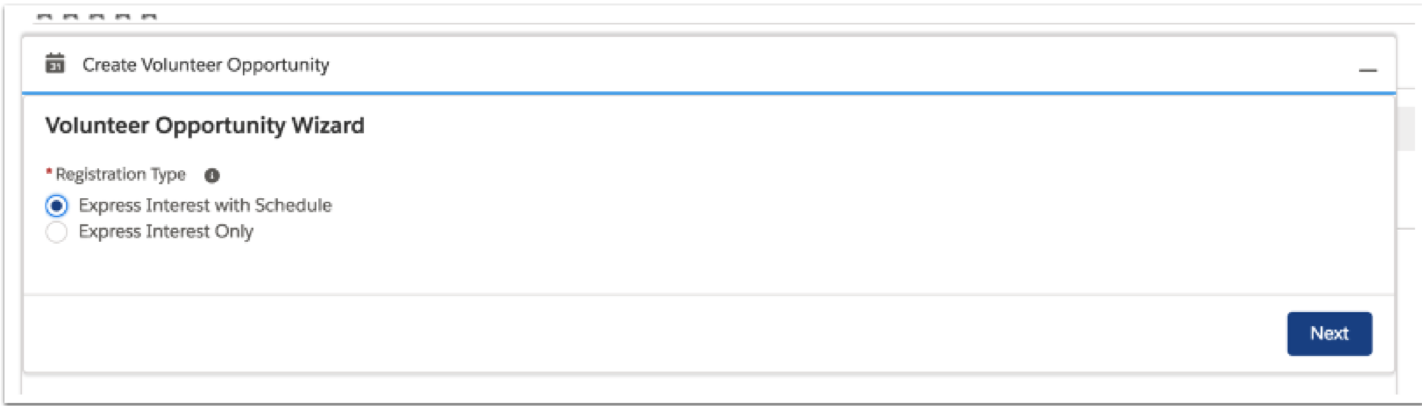
Click the NEXT button to continue.

Registration Type

There are two Registration Types to choose from:

- **Express Interest with Schedule -** choose this type when you want to define the days of the weeks and hours when you are open to volunteers scheduling themselves.   Volunteers will be able to express interest in one or more dates / times they'd like to volunteer -- and then you'll be able to review their proposed volunteering times (Connections), and approve, decline, and/or reschedule them. This is the easiest type of schedule to manage because volunteers can only propose times that fit the schedule you define, and you won't have to reach out to them and determine WHEN they'd like to volunteer
- **Express Interest Only -** choose this type of registration when you just want to find out who is generally interested in your volunteer opportunity. This is the right type if you don't plan to actually schedule volunteers to attend at a specific time and/or place, but just want to get a list of which volunteers are interested!

  For more information on choosing the right schedule type for ISO opportunities, see the article "Volunteer Opportunity Types"

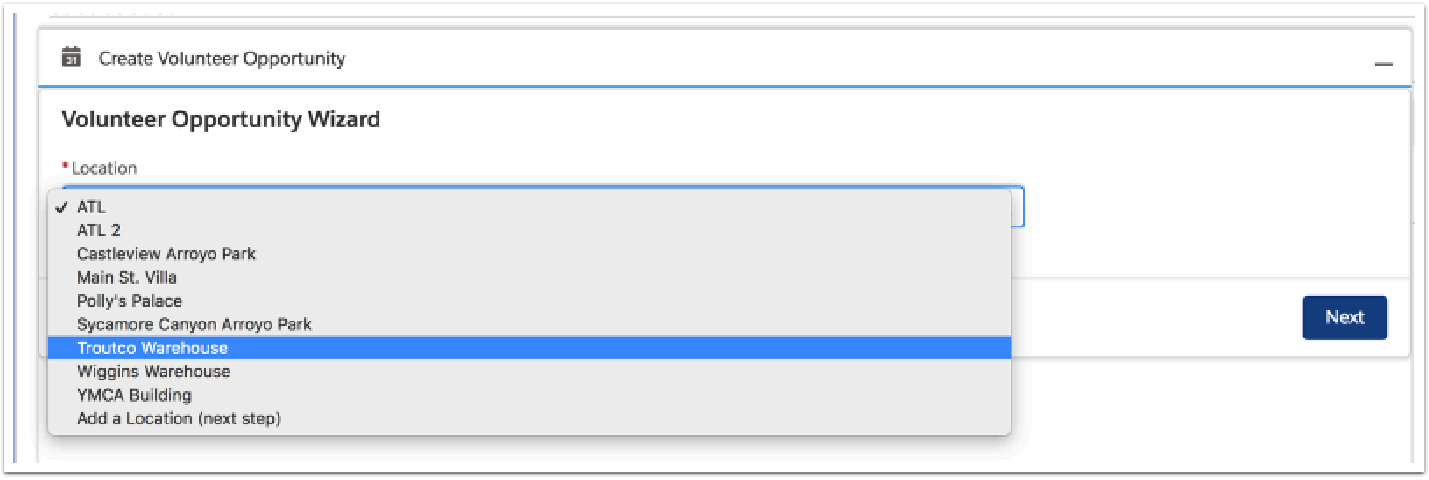


Let's continue in this example with creating an "Express Interest with Schedule" opportunity"

To See the next steps for "Express Interest Only" - click here to skip down further in this article.

On this screen you begin to set the schedule of when you need volunteers:

Choose a Location

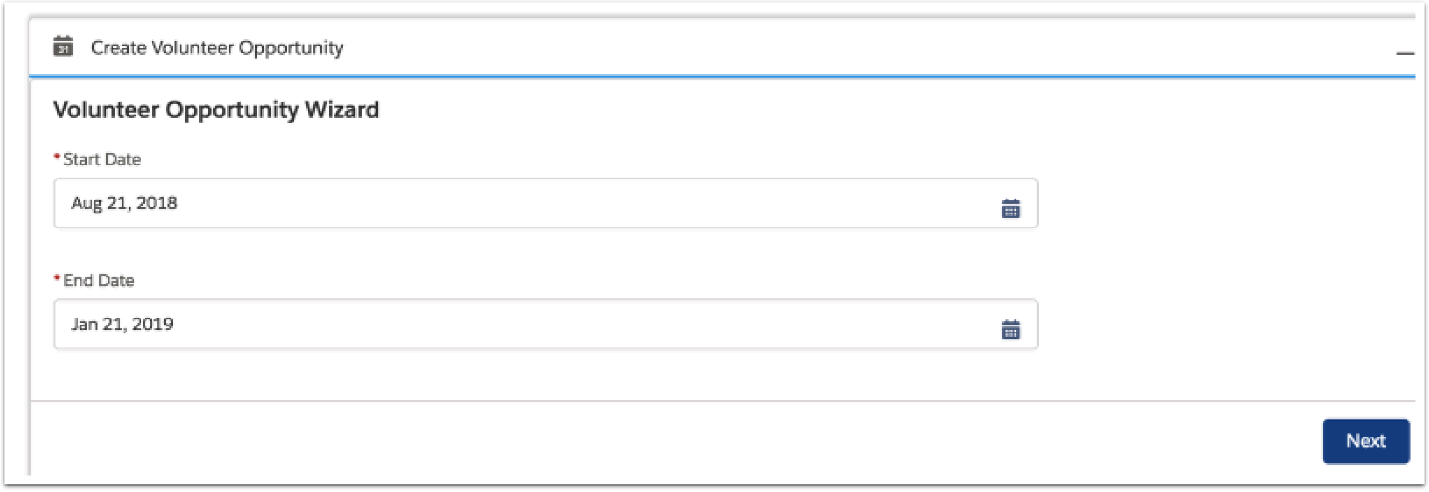


Choose an existing location you've previously created, or choose "Add a Location (next step)" if you need to create a new location.

Choose the Date Range that the opportunity takes place

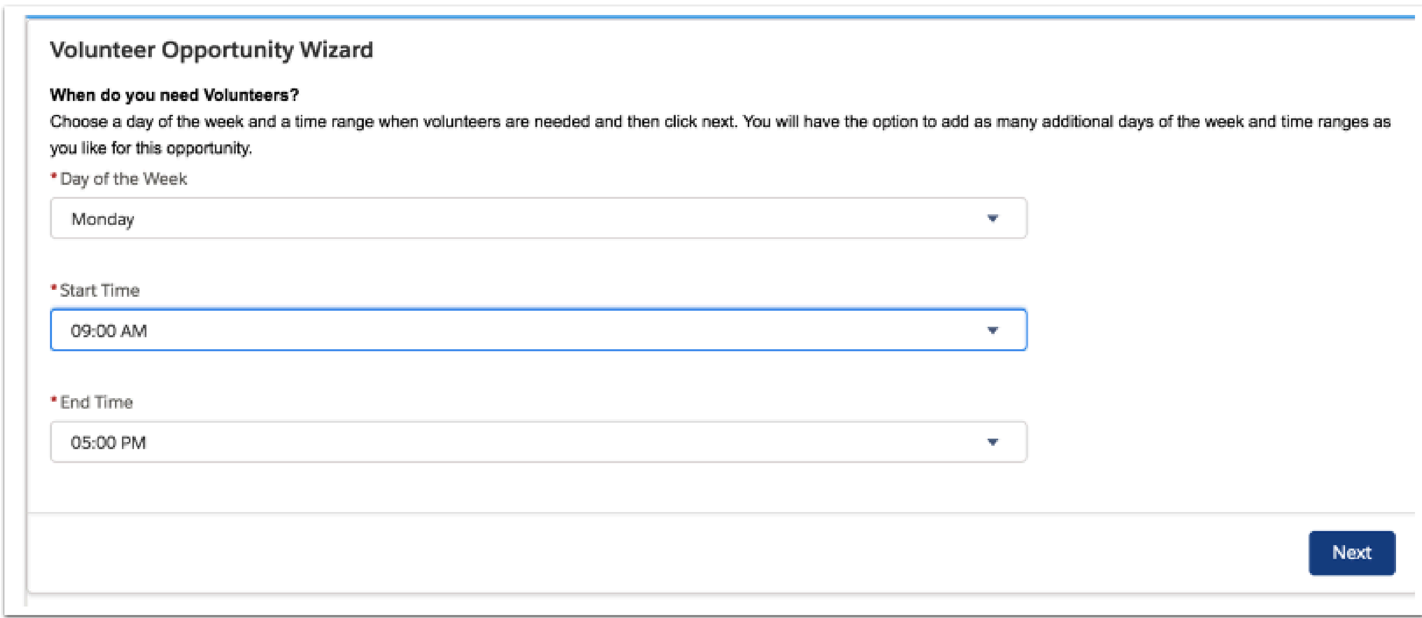
The Start Date is when volunteers can start volunteering for the opportunity. The End Date is the latest you are accepting volunteers to express interest in (for now. You can always update the End Date later to extend the opportunity)

Click Next to specify what days and times you need volunteers.



It's recommended that you don't set the end date more than 6 months ahead of now. Things will change, and rather than having to update connections that were made a year in advance, you don't want people to make committments too far ahead of time. (people move, locations change, etc.). We recommend no more than a six month initial interval for signups.

Choose the days of the week and time periods you want volunteers



Choose a day of the week, and the time range during which you need volunteers and click **next**. You'll have the option to add additional days and times so that you can specify each day of the week / time span when you need volunteers and they can propose their availability.

Example: if you say you need volunteers

- Mondays: 9:00 am - 5:00 pm
- Wednesdays: 12:00 - 5:00 pm
- Fridays: 9:00 am: 5:00 pm

Then a volunteer could propose their interest in volunteering:

- On a Monday from 11:00 am - 1:00 pm
- Every Wednesday from 12:00 - 2:30

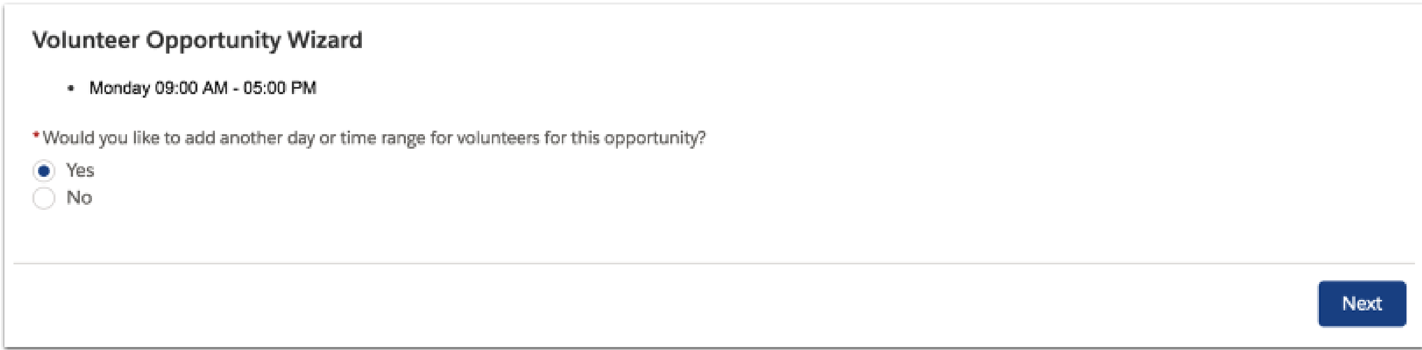
Volunteers would NOT be able to propose volunteering:

- On a Tuesday
- Wednesday from 4 pm - 6 pm

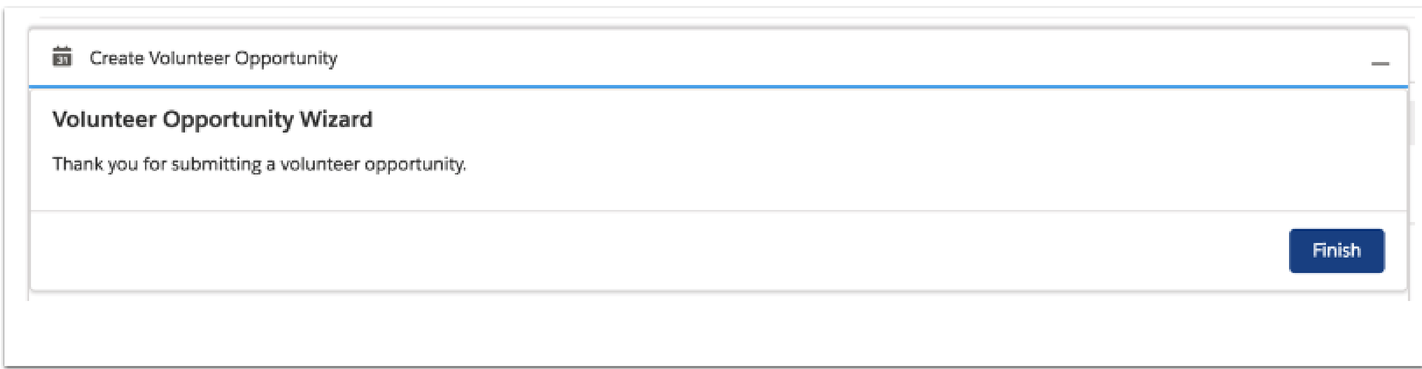
Add as many days / time ranges as you like to the schedule for this opportunity

To add another day or time range on the same day - answer YES, and click Next. You'll be taken back to the previous screen to add another day / time range.

When your schedule is complete, choose NO and click next.



After choosing no, you're opportunity is created and complete. Click Finish.



Go to the Volunteer Opportunities tab, and you'll see your newly created opportunity at the top of the 'recent volunteer opportunities' view. [Click on it to add any additional details to your opportunity](), and to publish your opportunity.

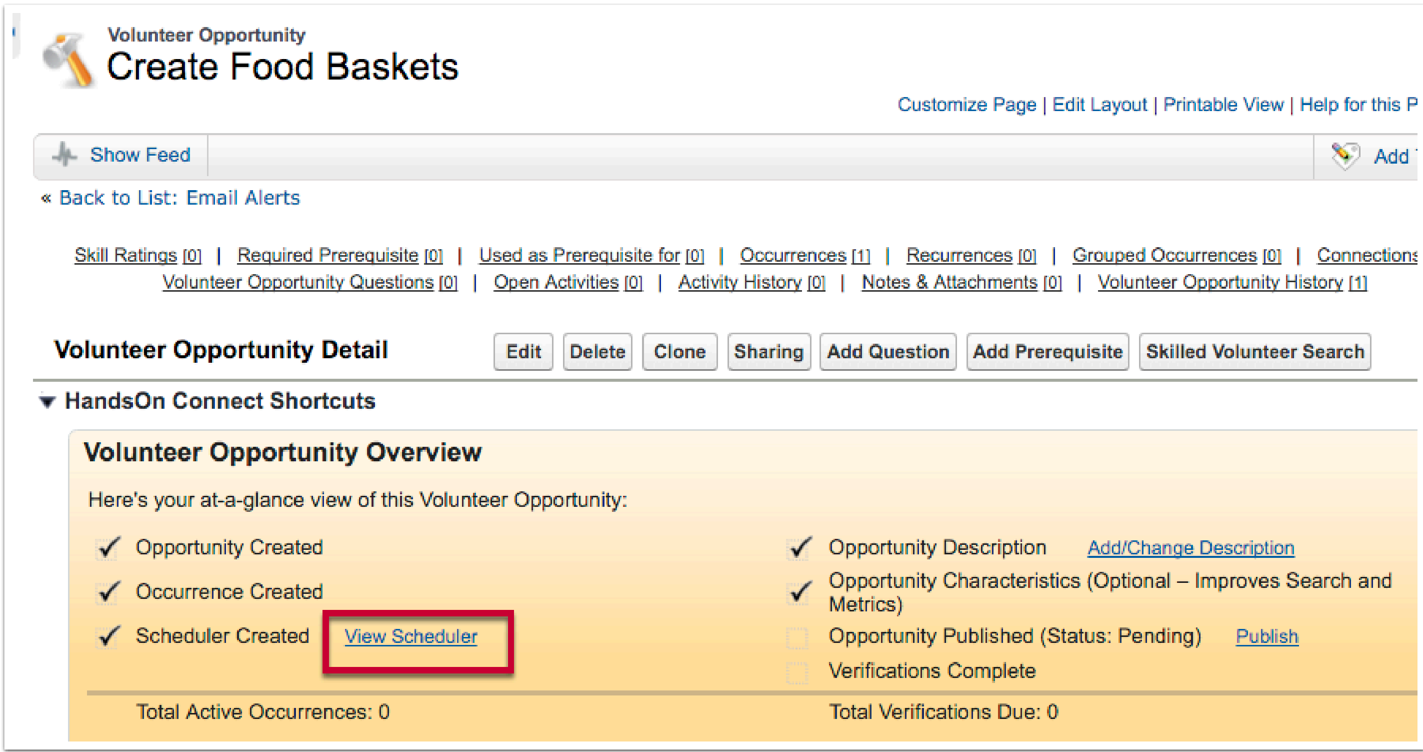
To Publish it: Click on the Publish Link in the Volunteer Opportunity Overview

Go to the Volunteer Opportunities tab and you'll see your newly created Volunteer Opportunity

Editing the schedule of an Individually Scheduled Opportunity - Express Interest with Schedule

If you wish to review and/or edit the schedule of when you need volunteers, you can do so from the Volunteer Opportunity Page.

Click on "View Scheduler"

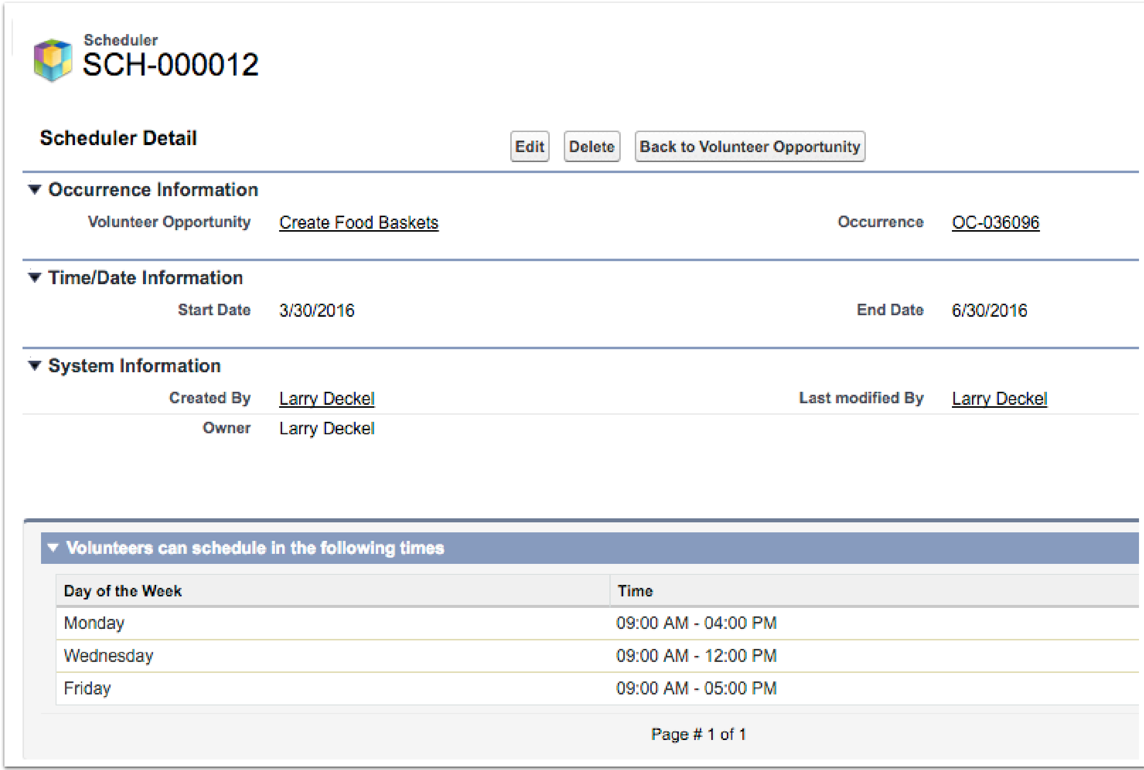


Scheduler Page

On the Scheduler Page you'll see the Start and End Date of the Individually Scheduled Volunteer Opportunity, and the days of the week / time ranges when you need volunteers. This schedule page controls when volunteers can and can't offer to volunteer. You can edit the schedule at any time by clicking on "Edit".

This is where you can change the days and times volunteers are needed. Editing the days and times will not affect existing connections that have been proposed by volunteers, but will define and limit when volunteers can propose a schedule in the future.

Click on Edit to make changes to the schedule:

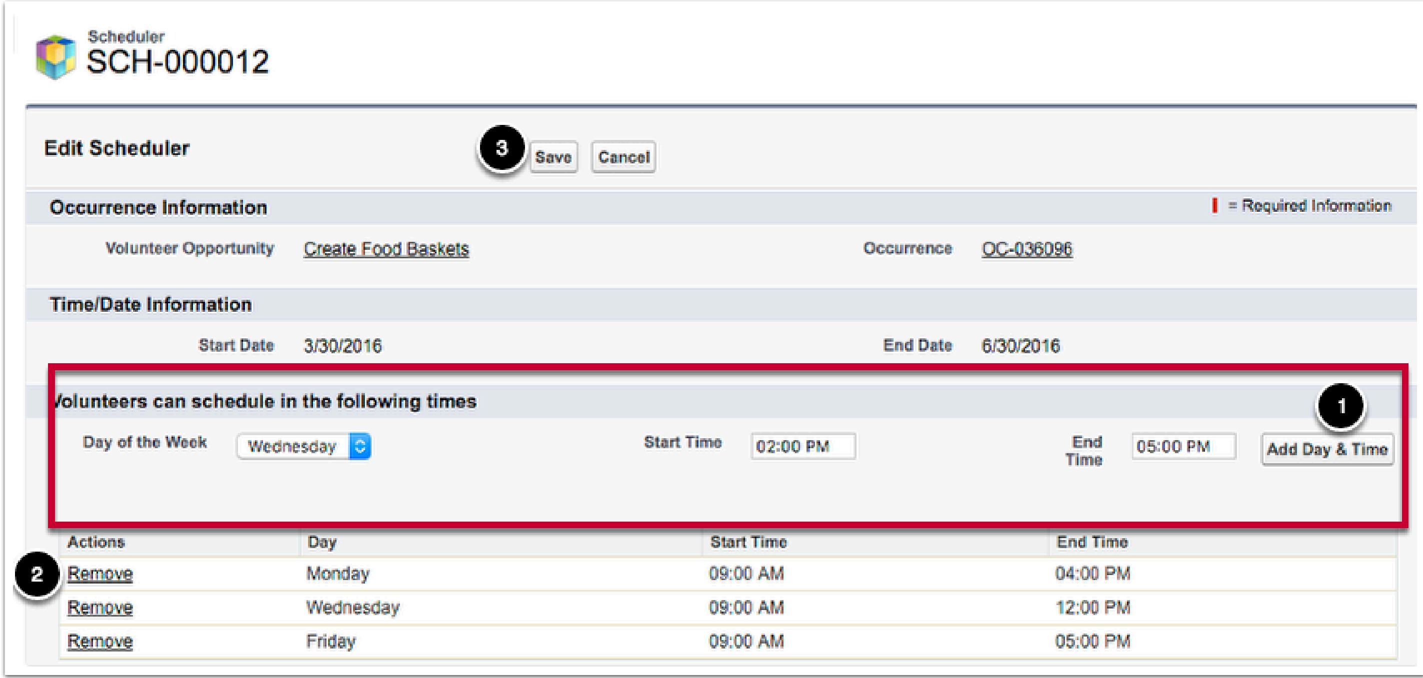


Scheduler Edit Page

1. You can create new schedule days / time spans by clicking Add Day & Time. Here I'm going to add an additional schedule for Wednesday. (notice that there is already a 9 - noon schedule -- but we're taking two hours off for lunch, so we don't want volunteers from noon - 2. You can add multiple schedules on this page by adding additional days and times.

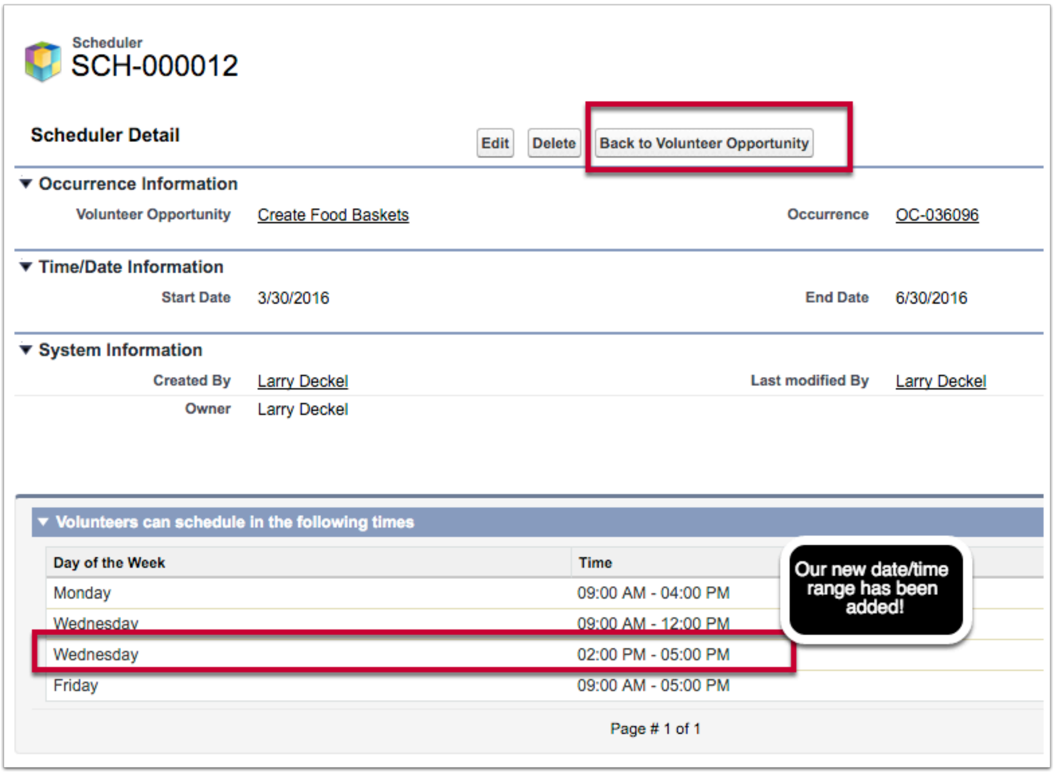
2. You can remove existing days / times by clicking "Remove"

3. Click Save after you've edited the schedule.



Saved view with new schedule added.

Click on "Back to Volunteer Opportunity" to go back to the Volunteer Opportunity record.



Notes about Individually Scheduled Opportunities - Express Interest with Schedule

Individually Scheduled Opportunities are for individuals, not teams

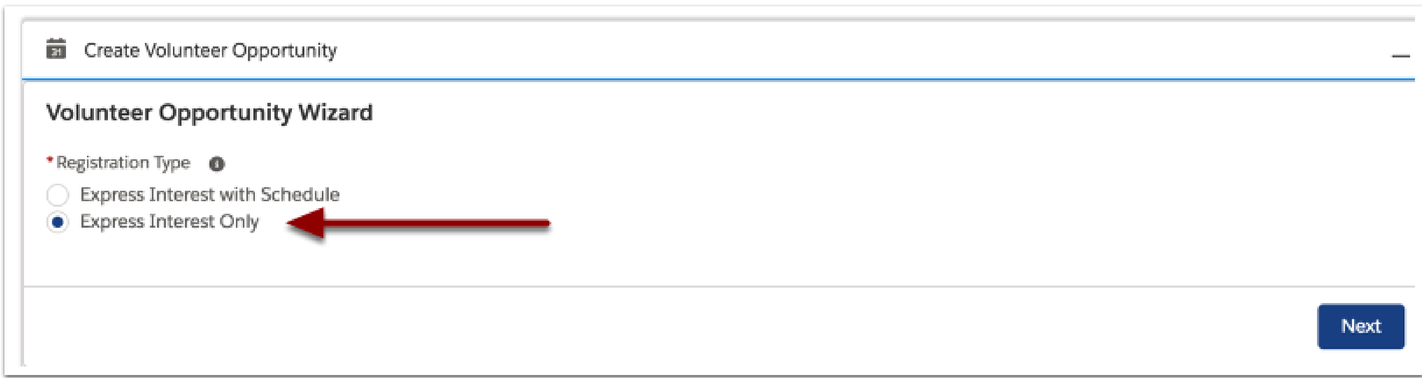
Individually Scheduled Opportunities are likely to have a lot of connections associated with them since a volunteer could potentially schedule themselves for up to 50 connections at a time. For this reason, we are not permitting team signups for these opportunities at the time. (A Team of 40 people signing up for a schedule with 30 dates would result in 1200 connections! That's not something we want to permit at this time.

Individually Scheduled Opportunities do not allow for custom questions.

Custom Volunteer Opportunity Questions in HandsOn Connect were designed to get an answer for one-time volunteers. Since Individually Scheduled Opportunities are intended to allow a volunteer to express interest in many different dates over time, we don't want them asked the same question over and over again. It would also generate many many of the same answers. At this time, Volunteer Opportunity Questions cannot be added to Individually Scheduled Opportunities. (Depending on demand, we may find a solution in the future where a question would be asked only one time over the entire engagement with this opportunity).

Creating Individually Scheduled Opportunity - Express Interest Only

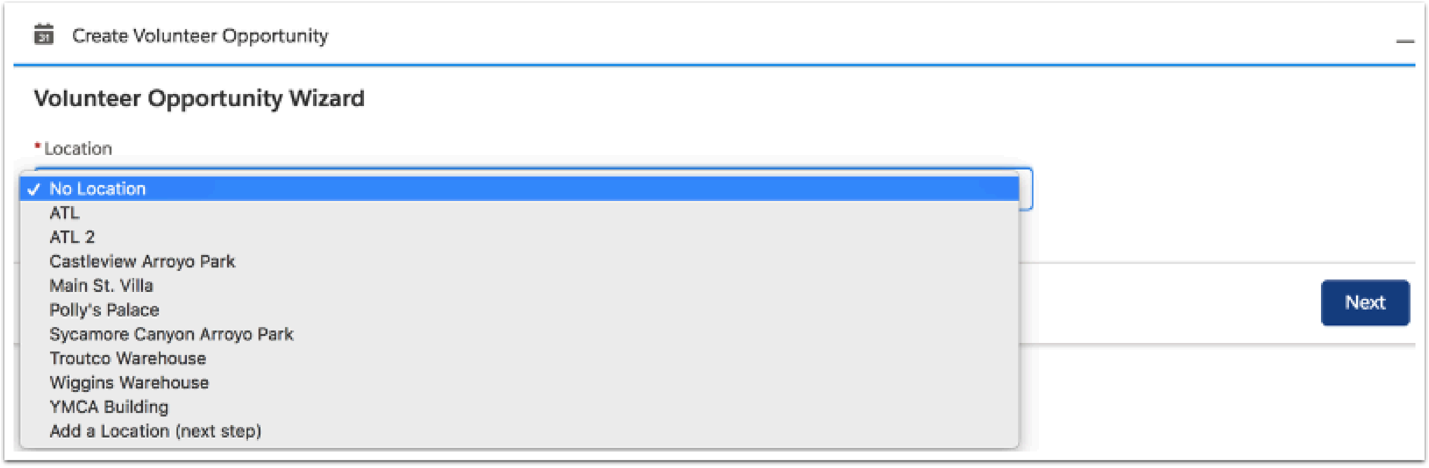
You'll follow the same process as listed above, up until the point you are asked the Registration Type. In this case, we'll use "Express Interest Only"



Because Individually Scheduled Opportunity - Express Interest Only does not necessarily take place at a specific date and time -- it can be used to just find out if people are interested in becoming board members, or interested in hearing more about upcoming disaster response opportunities.   That means connections won't be for a specific date and time, and may not even take place at a specific location.

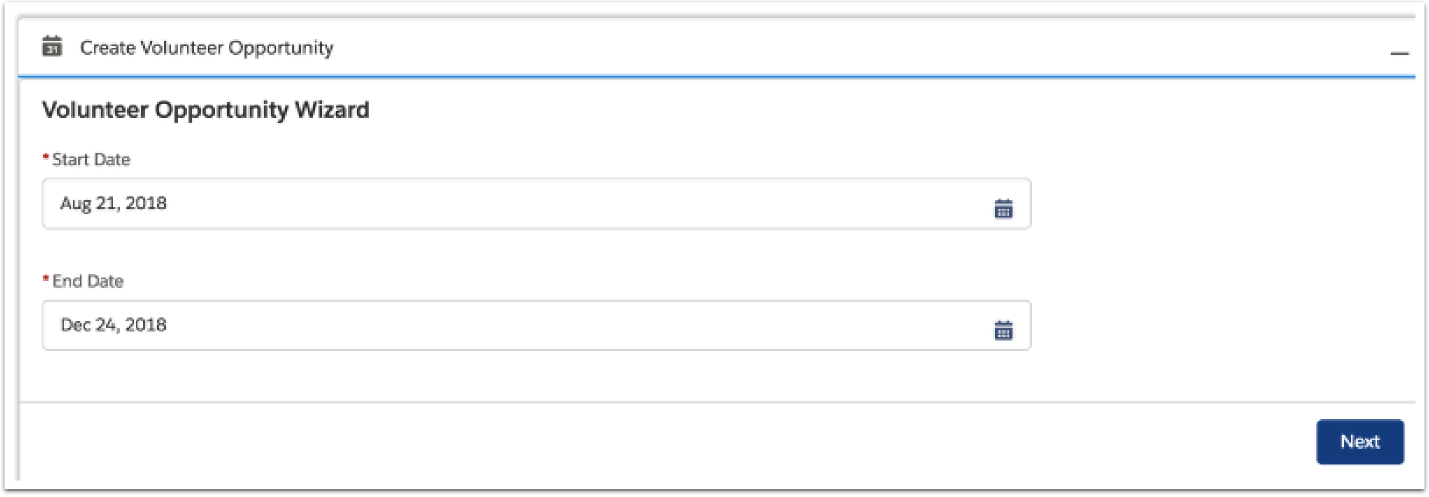
Location:

You can create a location, or choose an existing location, but you also have the option of having "No Location" for Express Interest Only Opportunities. Choose and click next.

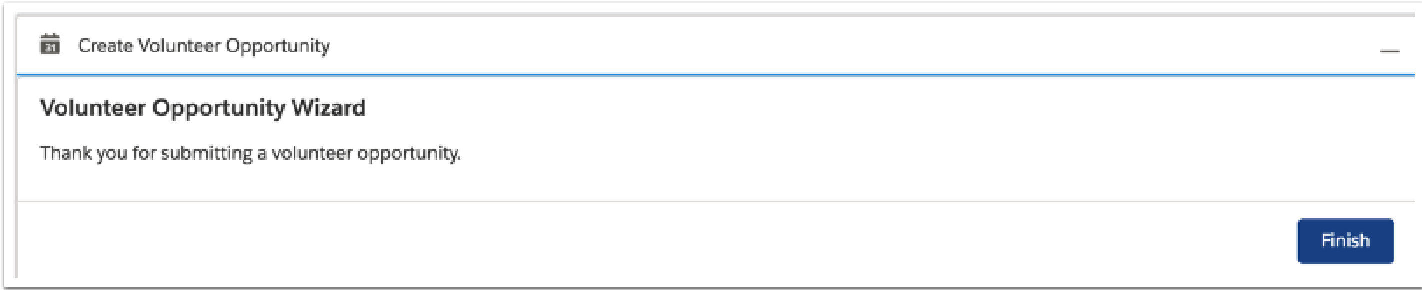


Start Date and End Date

Since this opportunity isn't looking for volunteers at specific times and days of the week (as "Express Interest with Schedule" registration does) -- we just need to list when to Start displaying the opportunity, and when to End displaying the opportunity on the public site.

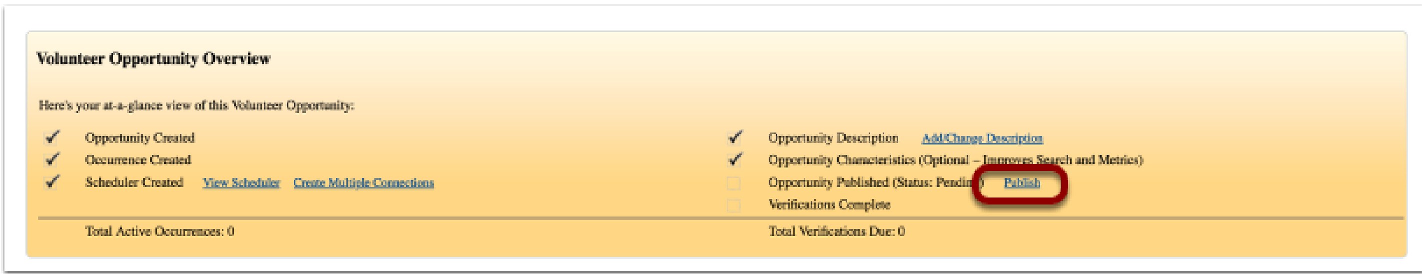


That's it! You're done! Click Finish!



Go to the Volunteer Opportunities tab, and you'll see your newly created opportunity at the top of the 'recent volunteer opportunities' view. Click on it to add any additional details to your opportunity, and to publish your opportunity.

To Publish it: Click on the Publish Link in the Volunteer Opportunity Overview

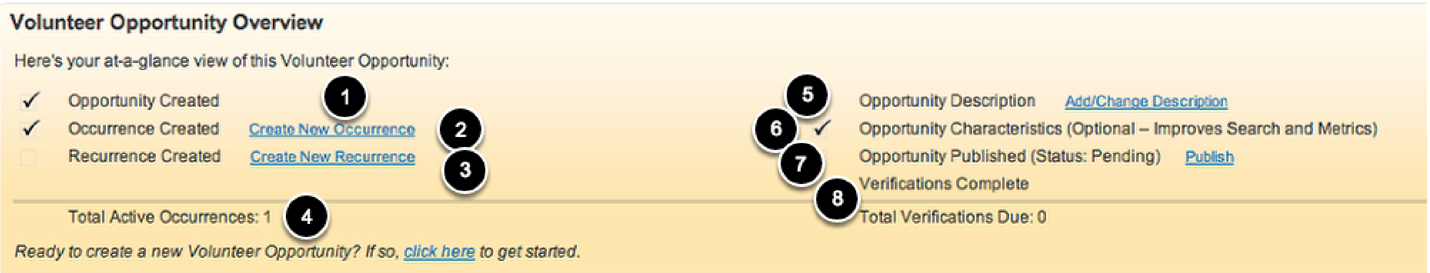


Other Characteristics of Volunteer Opportunities to consider before Publishing a Volunteer Opportunity and its Occurrence(s)

Understanding the Volunteer Opportunity Overview

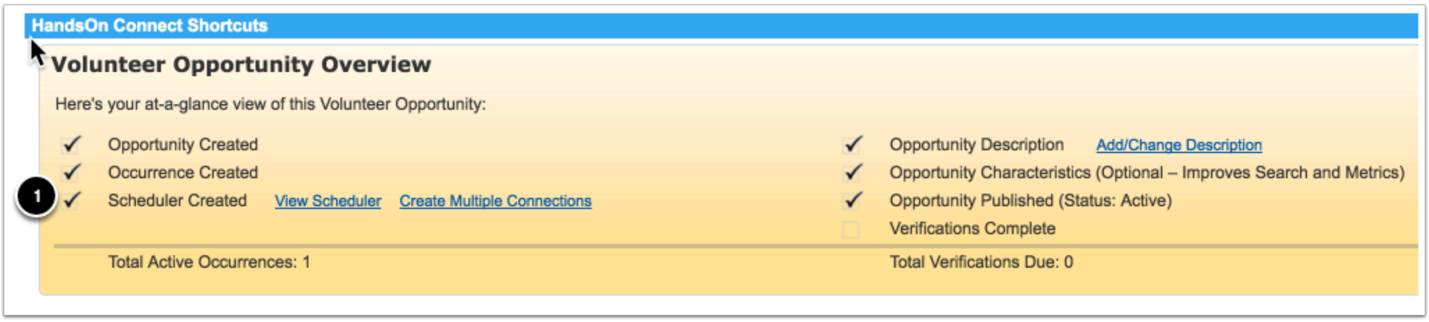
The Volunteer Opportunity Overview gives you a 'dashboard' view of the status of the Opportunity and whether or not its been published.

Volunteer Opportunity Overview dashboard



1. Opportunity Created tells us the basic characteristics of the opportunity have been successfully defined. (The checkmark to the left of each item tells us if its been done or not)
2. Occurrence Created - tells us that the opportunity has at least one occurrence defined. (Occurrences are what show up for sign-up on the public site. An opportunity without at least one occurrence will not appear on the public site).
3. Recurrence Created - tells us if there is a recurring pattern of occurrences that has been created in association with this opportunity
4. Total Active Occurrences - tells us the total number of occurrences that are in Active Status
5. Opportunity Description - Because this is unchecked, we know that the opportunity description, which much be created using the WYSIWYG editor before an opportunity can be published, is not yet created.
6. Opportunity Characteristics -- a few are always defined by the opportunity wizard - but there are more you can add to improve search and track national and local metrics.
7. Opportunity Published - tells us whether or not the opportunity is published on the public site. The fact that the status is 'pending' here tells us it is not yet published, and there is a link to publish the opportunity.
8. Verifications Complete / Total Verifications Due - tells us whether there are any outstanding verifications of service for occurrences now in the past.

Overview Dashboard for an Individually Scheduled Opportunity



For Individually Scheduled opportunities, there are links to "View Scheduler" and "Create Multiple Connections".

For more info on viewing and editing the scheduler for Individually Scheduled Opportunity with schedules, click here.

For more info on Creating Multiple Connections, click here.

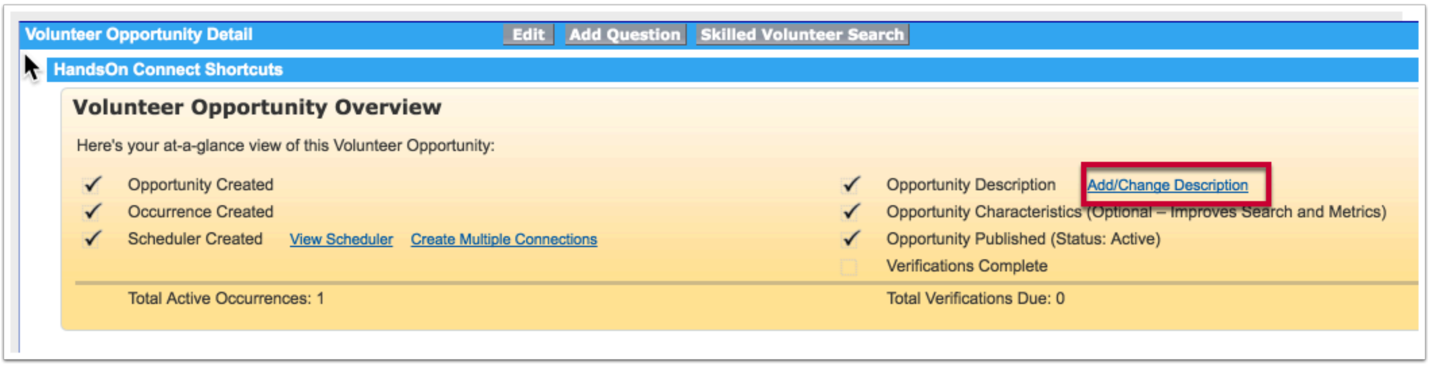
Individually scheduled Opportunities do nor have options to create new occurrences or recurrences -- because only one occurrence exists for these opportunity types

Editing Volunteer Opportunity Descriptions

When you first create a volunteer opportunity using the "Create Volunteer Opportunity" link - you put in a basic volunteer opportunity description which is text only.

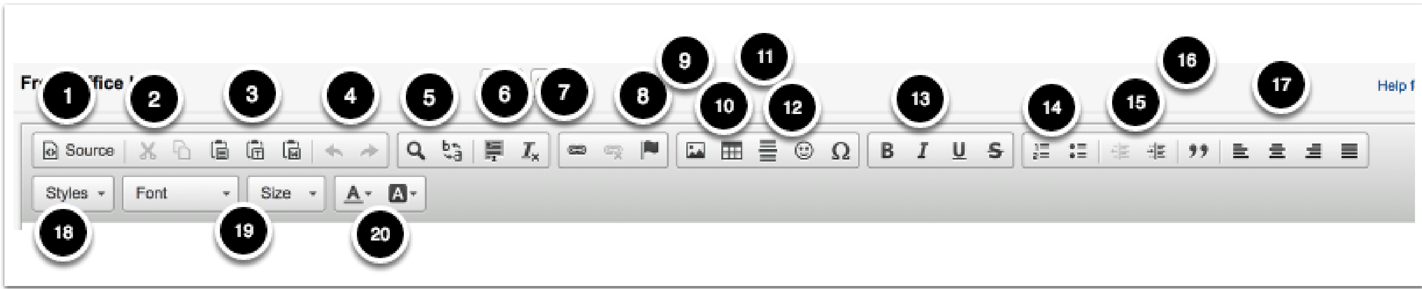
However, if you want to make it a bit fancier, you can edit that description and add boldface, italics, hyperlinks and more using our WYSIWYG editor.

On the volunteer opportunity detail page click on Add/ Change Description



This will open the WYSIWYG Editor for the project description.

The WYSIWYG editor icons



An updated WYSIWYG editor was released to HandsOn Connect in the December 2015 release. It is somewhat mobile responsive and resizes itself based on the width of your browser window.

When in the editor - you'll see the name of what you are editing in the Top Left of the editor window. (In the image above, we are editing the volunteer opportunity "To Be or Not To Be"

1. Source - allows you to see the html code. You can paste external code here or edit existing code produced by the editor.

2. Cut and copy icons.

3. Paste. Paste as plain text. Paste from Word.

(Be sure to use paste from word if copying from a word document.)

4. Undo and Redo.

5. Find and Replace

6. Select All and Remove Formatting. (Use the "Remove formatting icon to remove any formatting you've added to the text)

7. Link (see below) and Remove Link.

8. Anchors (see below)

9. Insert Image (see below)

10. Tables

11. Horizontal Line

12. Smileys and special characters

13. Bold. Italic. Underline. Cross out

14. Bullets and numbered lists.

15. Indent

16. Blockquote (can also be accessed via style menu)

17. Alignment

18. Style (see below)

19. Font and Size.   (if you want to deviate from the standard fonts and styles used by HandsOn Connect. Note.. not all fonts will work for all users, they must have the font installed in their machine for it to show up exactly as you specify it.)

20. Text color and background color.

Linking Text

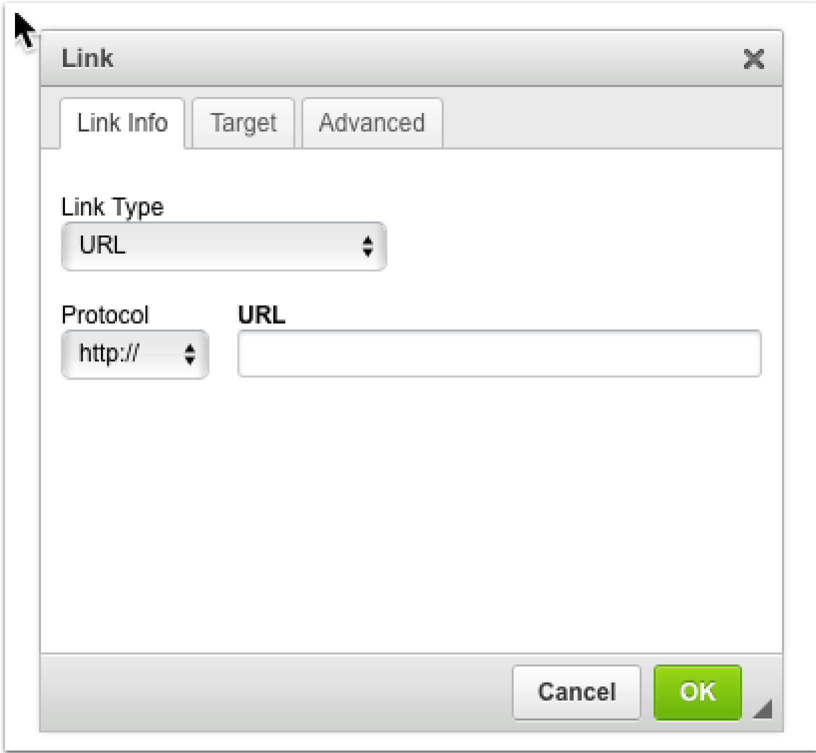
Select text or picture and click on the Link Icon. A popup will appear.

You can link to URLs, Anchors (see anchors below), or create a link to an email address.

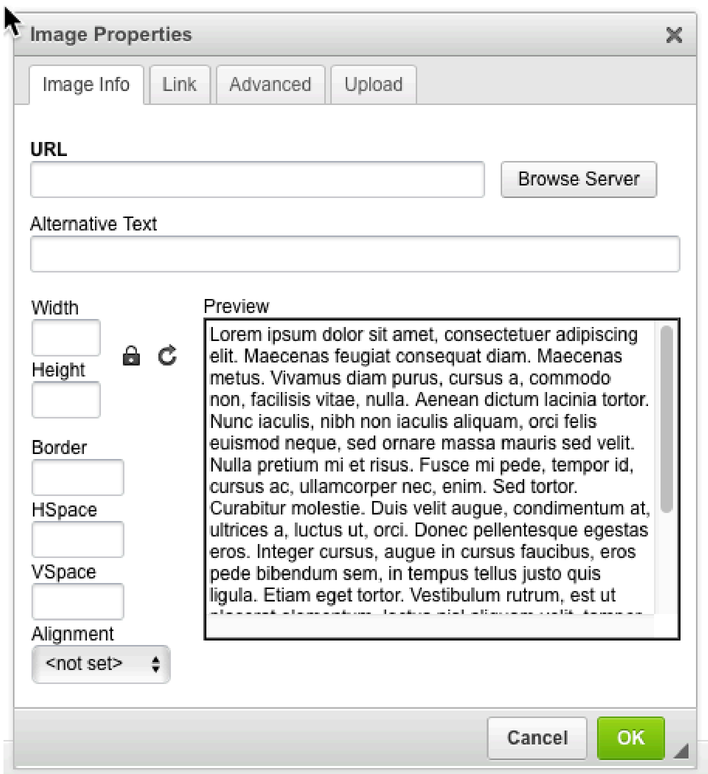
Use the Target tab to define whether the linked page opens on the same page, or a new page or tab.

We recommend always using relative links for pages within the site. The friendly URL 'news' would be linked as /news

You can define links as URLs, email links, or link to anchors you have inserted on the page.



Linking text or pictures



You can set the alignment, spacing width and height of images.

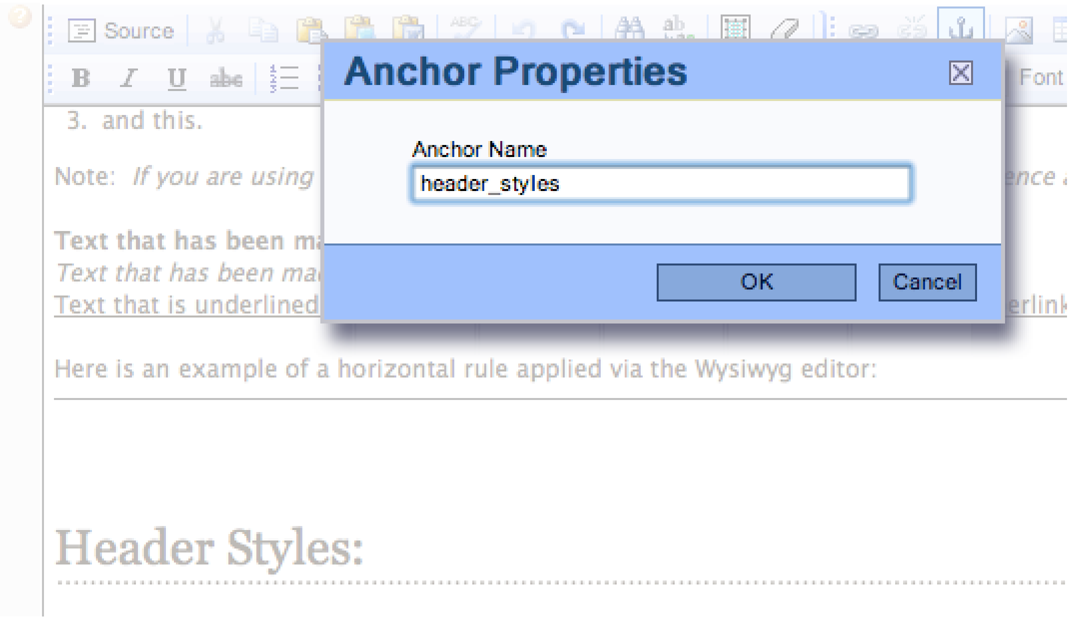
The Upload Tab will allow you to upload images to the server (Make sure they are optimized for web viewing. Large, non-optimized images will load slowly and take up a lot of data storage).

You can select from uploaded images by clicking on the Browse Server button and choose from any previously uploaded image.

Once selected, you can enter alternative text, edit the size, place a border, define the spacing around the image, and specify the alignment.

Note: The ability to upload images is only available to admin users on the back end of the site. Partners are not able to upload images.

Anchors



Anchors are used for long web pages where you may want to link to a specific spot on the page:

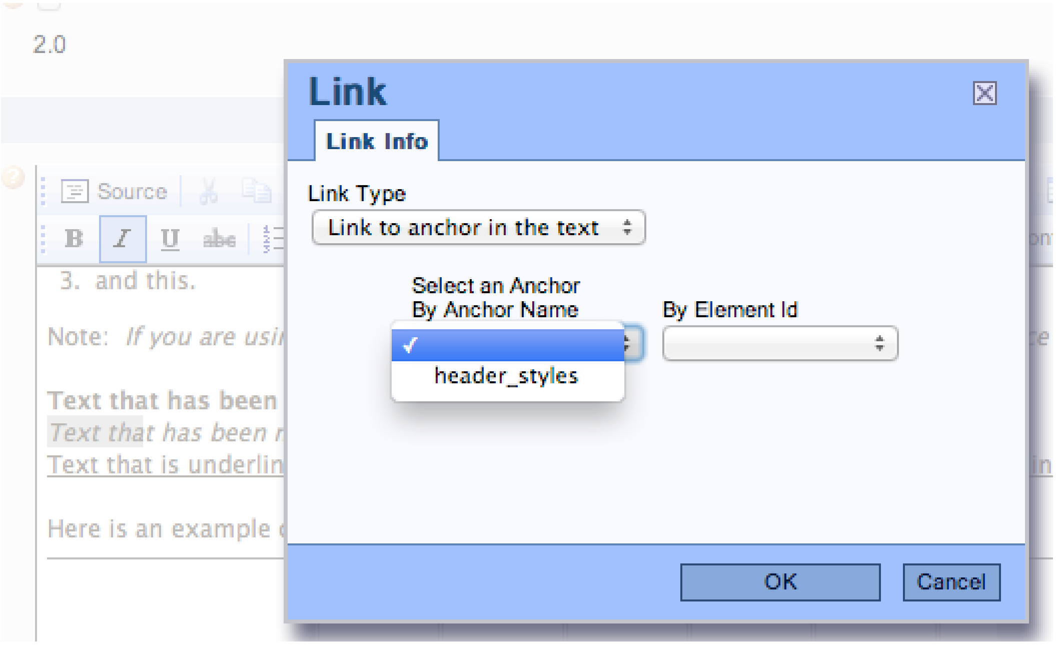
Place your cursor on the spot where you wish to place the anchor and click on the anchor icon.

Give you anchor a name.

The anchor will be placed in the spot you indicated.

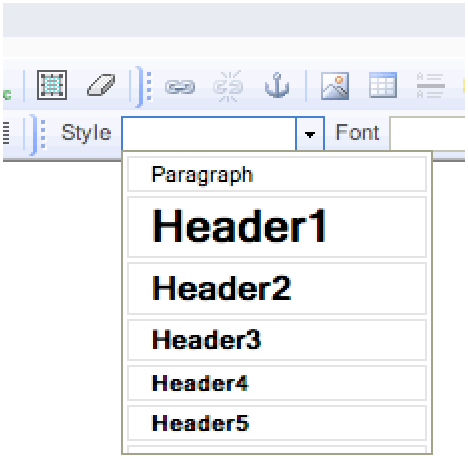
You can then link to the anchor by clicking on the text you wish to link, and selecting Anchor as the link type.

If the anchor appears on the same page - you'll be able to see any anchors you've created on the page in the anchor name picklist:



If you wish to link to an anchor on another page you'll need to name to manually code the URL for the anchor. The format is /pagename#name_of_anchor

Working with HandsOn Connect Styles



The .css in HandsOn Connect has a number of defined styles. We recommend using these styles to get a consistent, clean look to your web pages.

Here's what the different styles in the styles picklist look like when used on the site.

Text Styles

Text Styles

This is text appearing with no style applied in the WYSIWYG editor, Notice the spacing between each of the lines in quite tight. This is the default style when no style information is applied. Bullets applied to text look like:

This is text appearing with the style "paragraph" applied to it. Notice that it has a different amount of spacing between the lines. It can be easier to read due to its spacing but will take more space on the page.

Bullet points look like this:

- this
- and this
- and this

Numbered bullet points look like

1. this
2. and this
3. and this.

Note: *If you are using the paragraph style – there will be space between the sentence and the bullet points below it.*

Text that has been made bold.
Text that has been made italic.
<u>Text that is underlined. (Note, this usually confuses people into thinking its a hyperlink. Not recommended.)</u>

Here is an example of a horizontal rule applied via the Wysiwyg editor:

Styles

Various styles can be applied to text to produce headers of various levels. The exact look that each style will produce on your public size may vary from what is seen in the WYSIWYG editor itself, as each site template uses different .css to produce the looks of the various headers.

Its best to find a few styles you like, see how they look when the content is published on the site, and then rely on those styles.

Blockquotes and other styles

Working with Blockquotes

In order to create a blockquote you must first select the style 'blockquote' – and THEN type the text directly into the gray box that appears in the editor.

> First you select the style "blockquote" and then you can type text directly into the gray box that appears.
>
> You can not use the editor to turn existing text into a blockquote. You must select blockquote first – and THEN put the test into the blockquote area.

You can also place text to the site of the blockquote after you have created it. Just type along side the blockquote area. It will wrap around the blockquote.

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Other styles:

This is an example of the caption style.

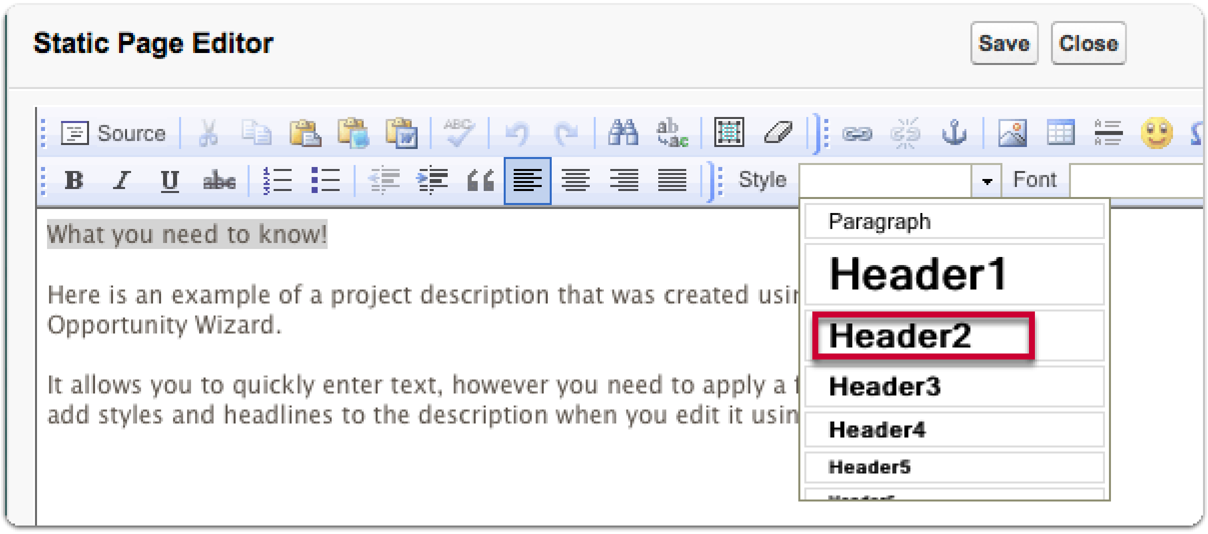
THIS IS AN EXAMPLE OF THE METADATA STYLE.

Working with styles if you create your project description in the new Volunteer Opportunity Wizard

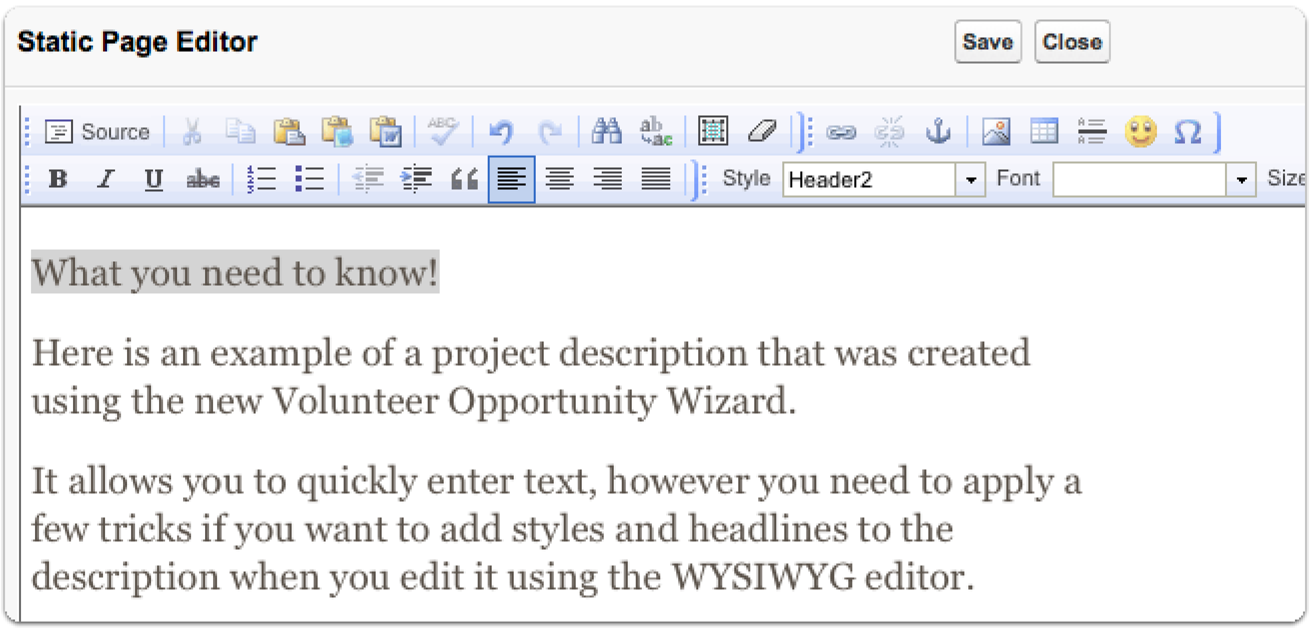
The updated Volunteer Opportunity Wizard ("Create Volunteer Opportunities") allows you to create a text-based description as part of the volunteer opportunity creation process. It places special code that will allow paragraph breaks to appear on the web.

If however, you wish to edit the description, and apply styles to it, you'll find that the style seems to get applied to ALL the text, rather than just the paragraph or headline you want it to appear to.

Here's what happens if you apply Header 2 to just one line of the description



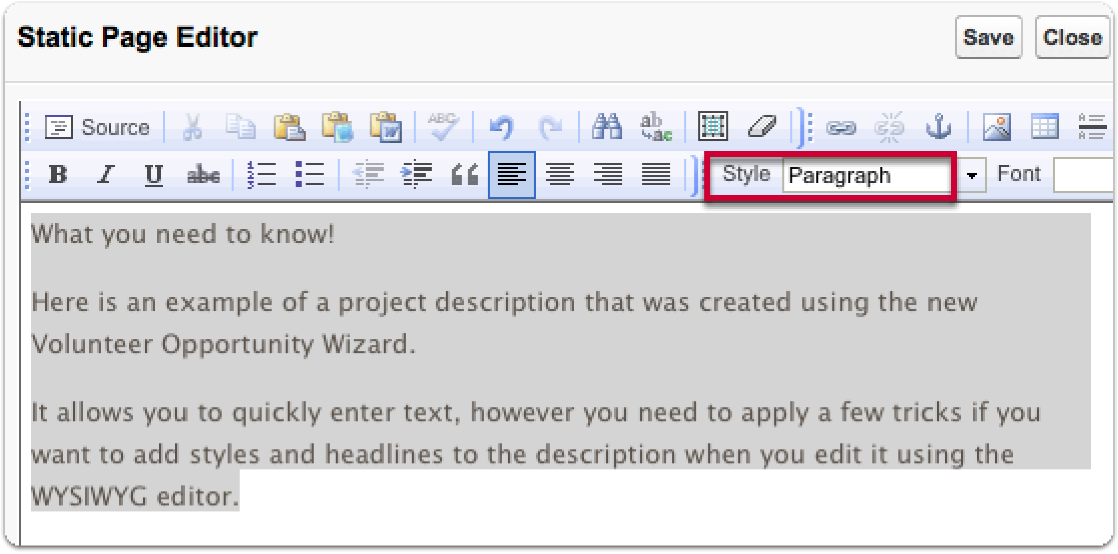
The entire description takes on the style :-(



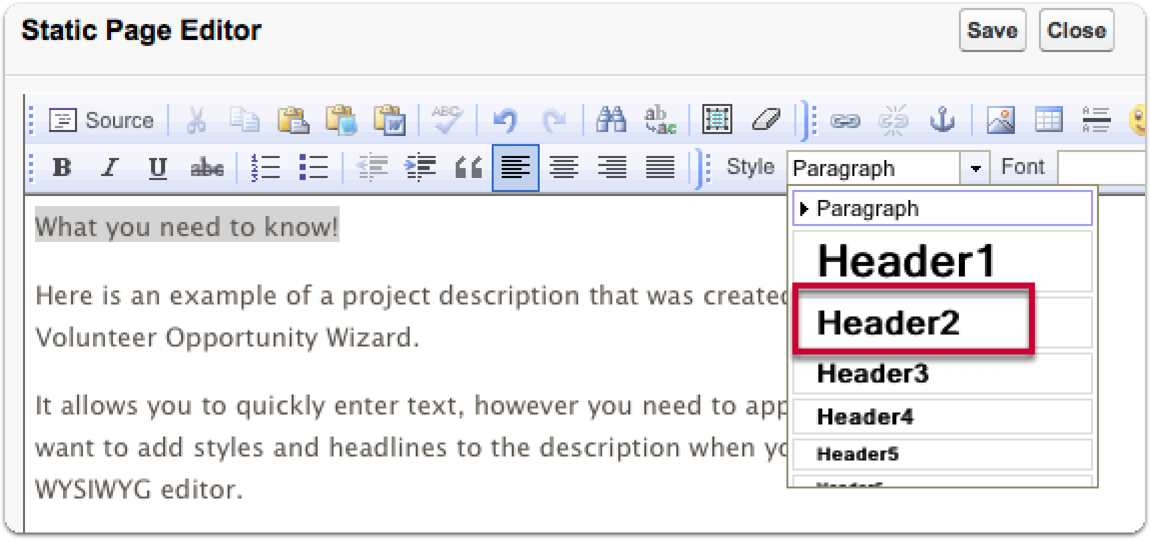
How to add styles to descriptions created via the new Wizard.

To prevent this problem from happening. Do the following before editing styles in the WYSIWYG Editor.

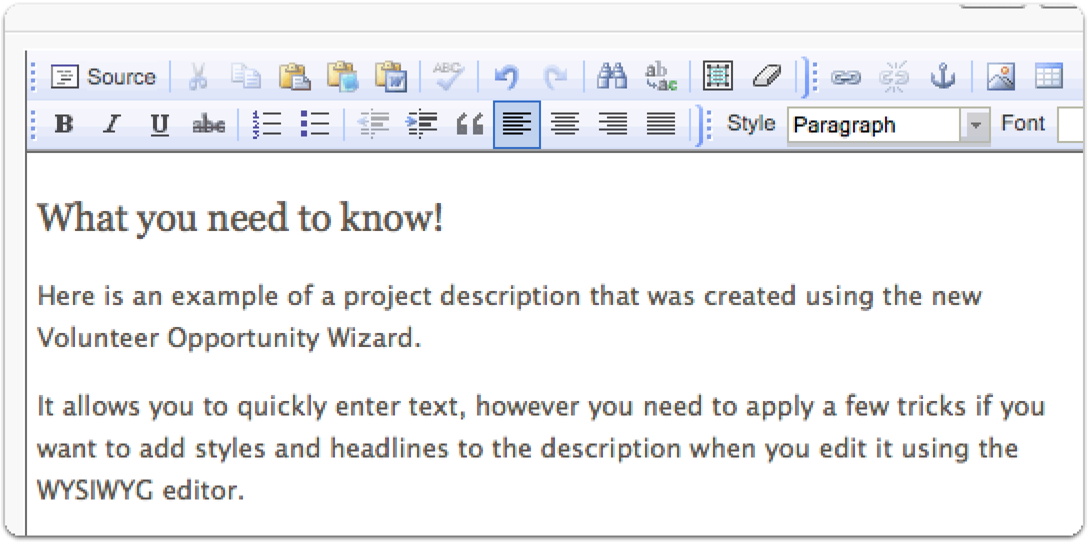
1. Select all the text and format it as 'paragraph" from the style dropdown.



2. After doing so, you'll be able to select a single paragraph and apply a style to it, without the other content being affected. Example: Now I'll pick the first paragraph and choose header 2



Voila: It works!


Source
Style
Paragraph
Font
What you need to know!
Here is an example of a project description that was created using the new Volunteer Opportunity Wizard.
It allows you to quickly enter text, however you need to apply a few tricks if you want to add styles and headlines to the description when you edit it using the WYSIWYG editor.

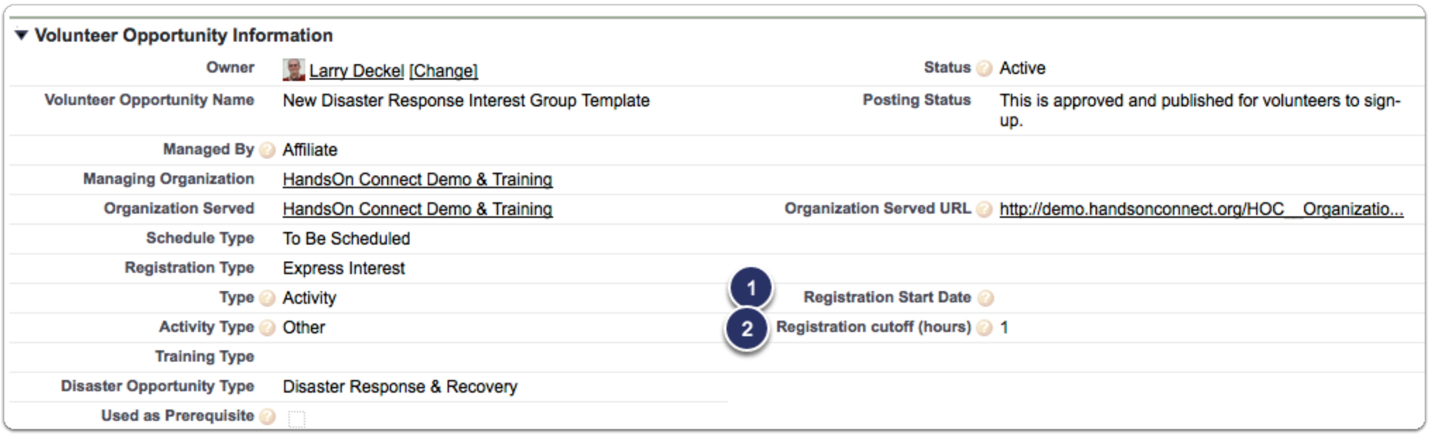
The Volunteer Opportunity Page Layout (other fields to consider before publishing a volunteer opportunity)

Using the Opportunity Creation Wizard gets the required information into the system, but to have the best data and best user experience, you should also add information that aids volunteers in search, and allows you to track important metrics. You can also add finer sign-up control to your opportunities by adding additional restrictions that govern the sign-up process. You can also add additional occurrences and recurrences. This post goes over other sections of the Volunteer Opportunity record that you should be familiar with - and explains how to use them.

Note: the layout of the volunteer opportunity page may vary from instance to instance as it can be customized by the system administrator. The decision as to which page layout to use (which can be different for different profiles) can be set by the system administrator who assigns page layouts to profiles.

But here are the primary fields and options to consider before publishing a volunteer opportunity:

The Volunteer Opportunity Information section



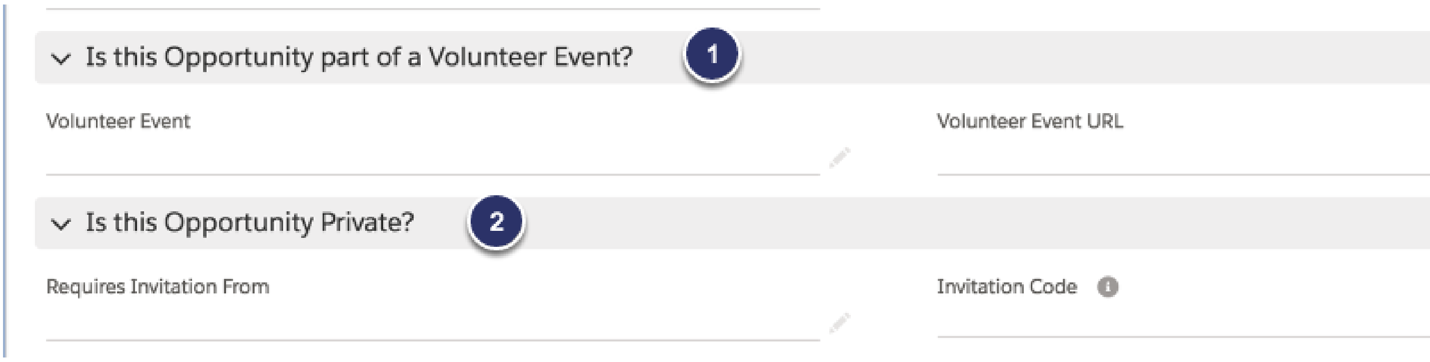
This gives you a summary of the characteristics of the volunteer opportunity.

Most of these fields are automatically set for you when you create the opportunity with the wizard. The only fields you might choose to update here are.

1) Registration Start Date - (if you wish to list the opportunity but not allow registration until a certain date)

2) Registration cutoff (hours) - by default this will be 1 hour. If you wish to cutoff signups early than that, you can increment the hours before start time to cutoff signups.

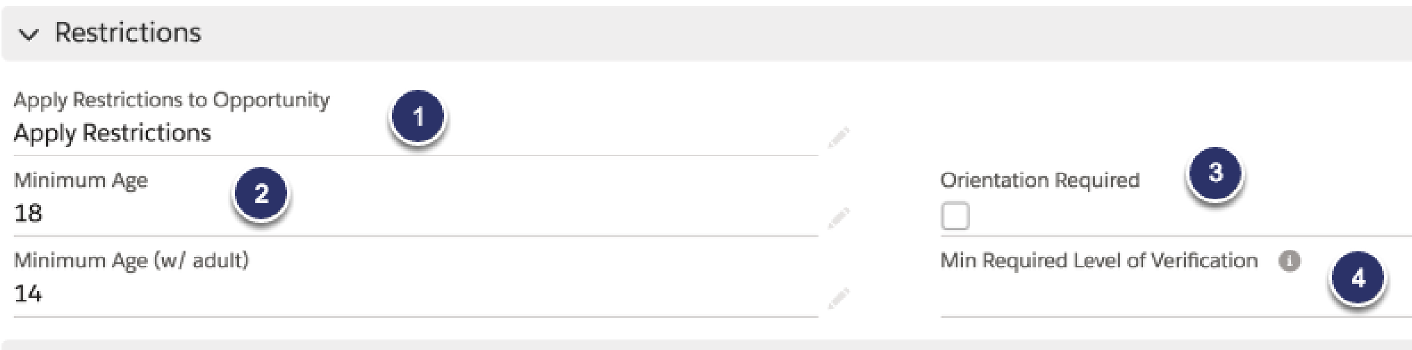
Is this Opportunity....



1. If the opportunity is part of a [Volunteer Event](#) (aka "Special Events" on many sites) then edit this field. Double click and use the lookup item to associate the opportunity to a previously created volunteer event.

2. Is the Opportunity private? If this is a private opportunity - edit this field and lookup the name of the organization it's private for (they must have an invitation code already established in the organization record). Once saved, the invitation code will automatically be pulled into this record for you. The opportunity will no longer be found in public search and will require an invitation code on either the search page or the company's 'business page".

Restrictions



Restrictions can be set to control who can and can't sign up for opportunities:

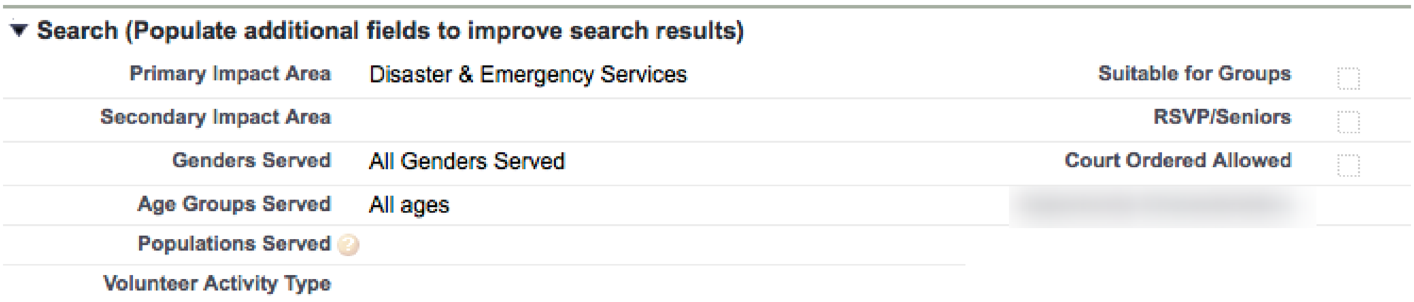
1. By default, restrictions are always enforced for Full Sign Up Opportunities. Some organizations do not apply restrictions for "Express Interest" opportunities, and some do. You can change whatever the default behavior is for your organizationby editing this field. (System admins can change the defaults site-wide if they chose to).

2. Age restrictions are populated here via the volunteer opportunity wizard and can be edited or changed here. You can optionally set a maximum age as well.

3. If you want to restrict this Volunteer Opportunity to contacts that have been flagged as completing orientation, check this box.

4. If you require background checks, and are using the ["Verified Volunteer" add-on for HandsOn Connect](), you set the Minimum Required Level of Verification here.   If you are not using verified volunteers, this field will say "Background Check Required" and will not allow signup for any contact that is not flagged as "background check completed".

Search (Populate additional fields to improve search results)



The items in this section all impact the advanced search characteristics available on the public site. The primary impact area is set when creating the opportunity with the Volunteer Opportunity Wizard. By default, the required fields "Genders Served" and "Age Groups Served" are set as "All".

But populating additional search characteristics can make for more powerful search results for your volunteers.

1. A secondary impact area can be set if desired

2. You can adjust the picklist of Genders Served to specify if it serves only men or women (by default All Genders served is populated for you)

3. You can target the age groups served through the picklist (by default "All ages" is populated for you)

4. Populations Served is a multi-picklist of 'target populations'. You can choose from a variety of targeted populations including "Homeless", "Seniors" and others or your system admin can add additional values to this list.

5. Volunteer Activity Type is a multi-picklist of the tasks that this activity involves. It includes items like "Caring for animals", "Administrative Support / Clerical" etc. Useful for people looking for Volunteer Opportunities based on WHAT you do, rather than the impact it has. It's use and the items in the picklist is optional and can be customized.

6. Suitable for Groups**.** You can flag the opportunity as being "Suitable for Groups" (team captains will often search for opportunities that welcome a larger group of volunteers).

7. RSVP / Seniors. you can flag a volunteer opportunity as a good match for seniors or volunteers in RSVP programs.

8. Court Ordered Allowed. If you are running a court ordered program, checking the "Court Ordered Allowed" box will **allow** a contact that is flagged as a "Court Ordered Volunteer" to sign-up for this opportunity (otherwise a court-ordered volunteer will be restricted from signing up for this opportunity.)

National and Local Metrics. (classic)

In some page layouts this section has been simplified and renamed to "Impact and Programs (Keyword Searchable)

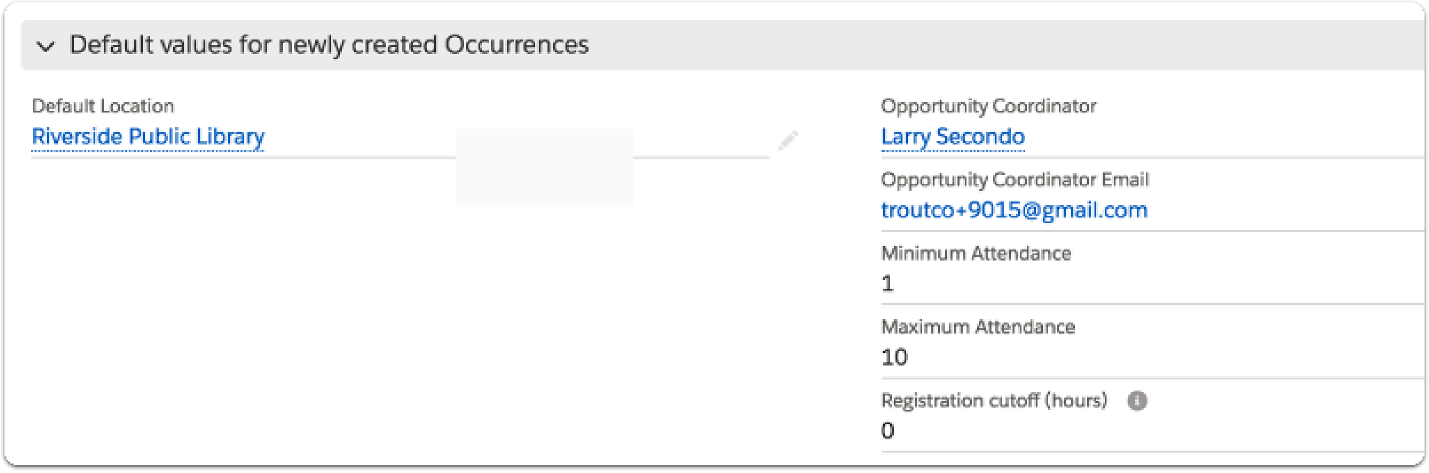
The items on the left side of this section are used to collect data for the Annual Affiliate Report for HandsOn Network. The items being tracked may change nationally from year to year. They can be ignored if you are not part of the HandsOn Network

The fields Impact Area (Local) and Program Area (local), are starter picklists that your administrator can edit to reflect local impact tracking you are doing. (Click here for instructions on editing picklists) Your administrator can aso add additional local metrics fields if desired. (click here for how to add additional custom fields)

The values in Impact Area (Local) and Program Area (Local) can be used in keyword searches. This provides you wish a way for designating and searching for opportunities that are "holiday opportunities" or "Mayor's Program" or other terms that you want to use to create custom local searches.

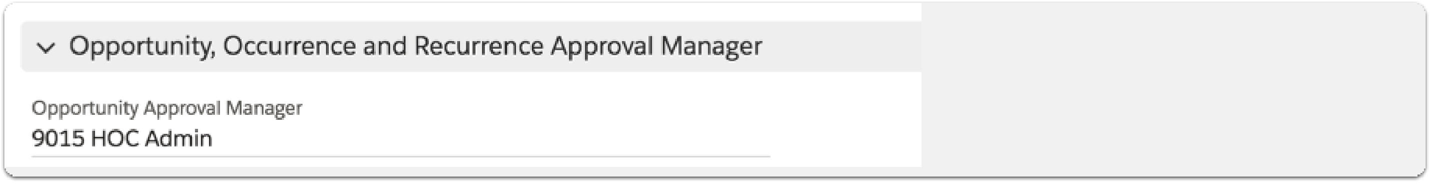
Filling out each of these fields for each Volunteer Opportunity will allow you to quantify the impact of what you are doing in reports. You can add additional fields to this section to track other local variables used for reporting.

Default Values for newly created Occurrences



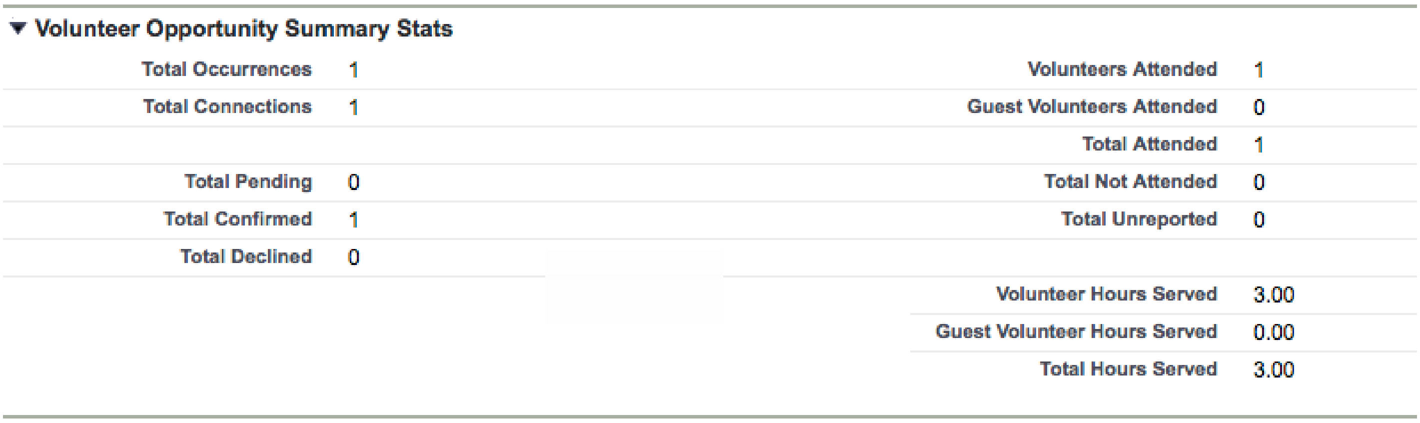
These show the default values (entered in the Volunteer Opportunity Wizard) that will be used when you create future occurrences of this opportunity.

Opportunity, Occurrence and Recurrence Approval Manager



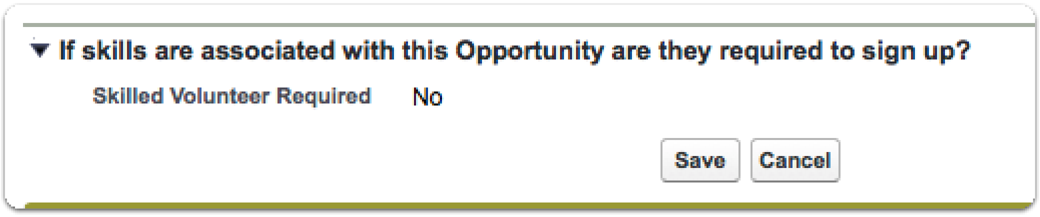
These are automatically filled in for you, and track who in your organization approves newly submitted opportunities, occurrences and recurrences. If you use Volunteer Leaders, the person in charge of making those assignments is noted here as well.

Summary Info



This section is automatically updated for you and gives you a summary of the data associated with this volunteer opportunity.

If skills are associated with this opportunity are they required to sign up?



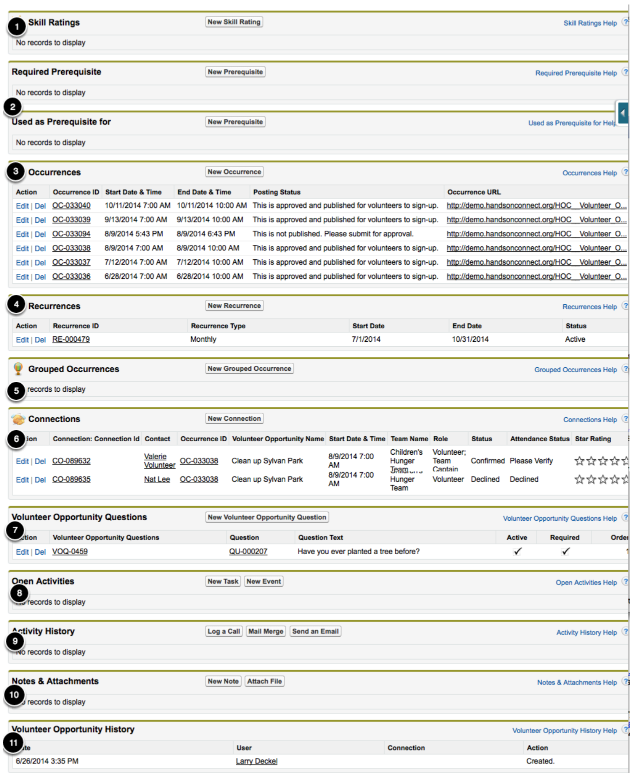
If you want to restrict sign-up to only people who have a skills profile that matches skills you relate to this opportunity, set this value to YES. (Set to No, the skills you associate will still be associated with this opportunity in search, but volunteers can sign up for the opportunity whether or not they have matching skills.)

Note: This section and field are generally not on the page layout if your organization has not enabled skill profiles for volunteers.

Related Lists for Volunteer Opportunities

The Volunteer Opportunity record layout includes a number of related lists that summarize and provide links to related objects:

The following related lists are in the record layout. (Salesforce Classic)



Which related lists are visible - and the order in which they appear may vary in your instance. These lists can be added, deleted, or reordered by your system administrator.

1. Skill Ratings - A list of the skills associated with this Volunteer Opportunity that may or may not be required for the Volunteer Opportunity (depending on the setting of the "Skills Required" field in the Volunteer Opportunity record itself.

2. Prerequisites - is an optional object that may or may not be enabled in your instance. See this post for how to enable prerequisites.

3. Occurrences - A list of all the occurrences (past and future) of this Volunteer Opportunity

4. Recurrences - Any recurring patterns of occurrences that have been created for this Volunteer Opportunity

5. Grouped Occurrences - an optional object that may or may not be enabled in your instance. [See this post for how to enable grouped occurrences](#).

6. Connections - A list of volunteers who have signed up or expressed interest in the Volunteer Opportunity

7. **[Volunteer Opportunity Questions-](#)** These are 'custom questions' that are asked of volunteers when they sign-up or express interest in the Volunteer Opportunity.

8. Open Activities - These are any unfinished tasks that have been created in association with this opportunity

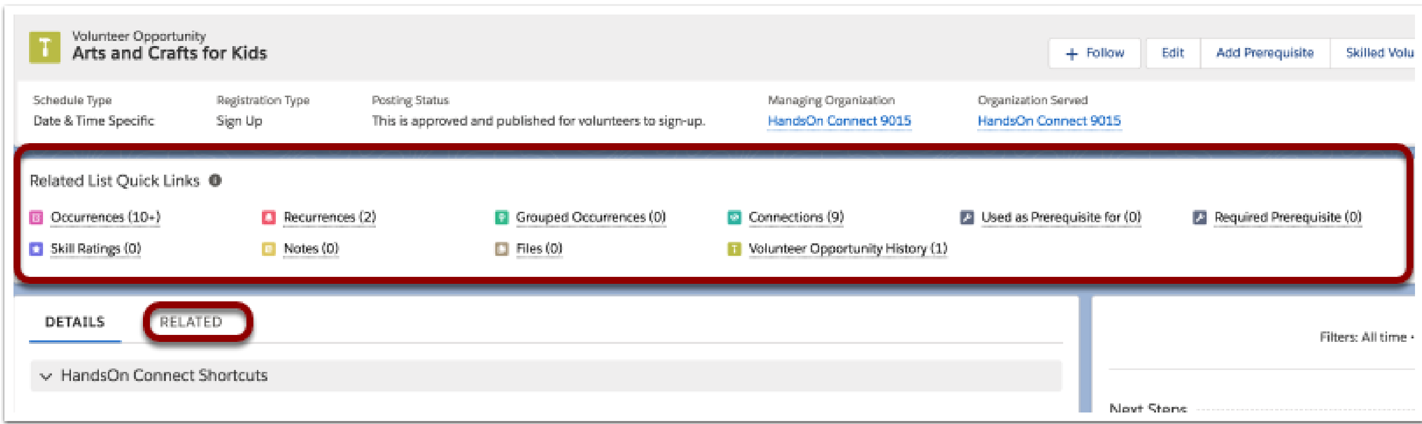
9. Activity History - Details of past activities created in association with this Volunteer Opportunity

10. Notes & Attachments - You can add notes or upload attachments that are associated with this Volunteer Opportunity

11. Volunteer Opportunity History - Information on when the record was created, and who and when it was modified.

Related Lists in Salesforce Lightning:

In lightning related lists can be found in the "Related" tab and/or through the Related List Quick Links:



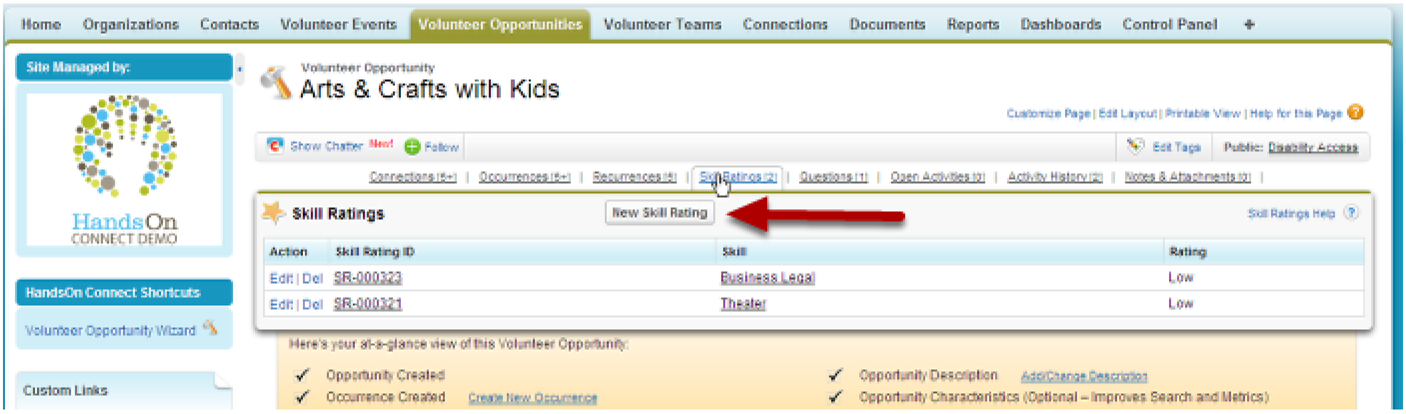
Creating a Skill Rating

Skill Ratings Can be associated with Volunteer Opportunities (just as they are associated with volunteers who fill out a skill profile on the public site.

They also serve as a restriction to sign-up IF you specify in the [Volunteer Opportunity Record that the skills are required.]()

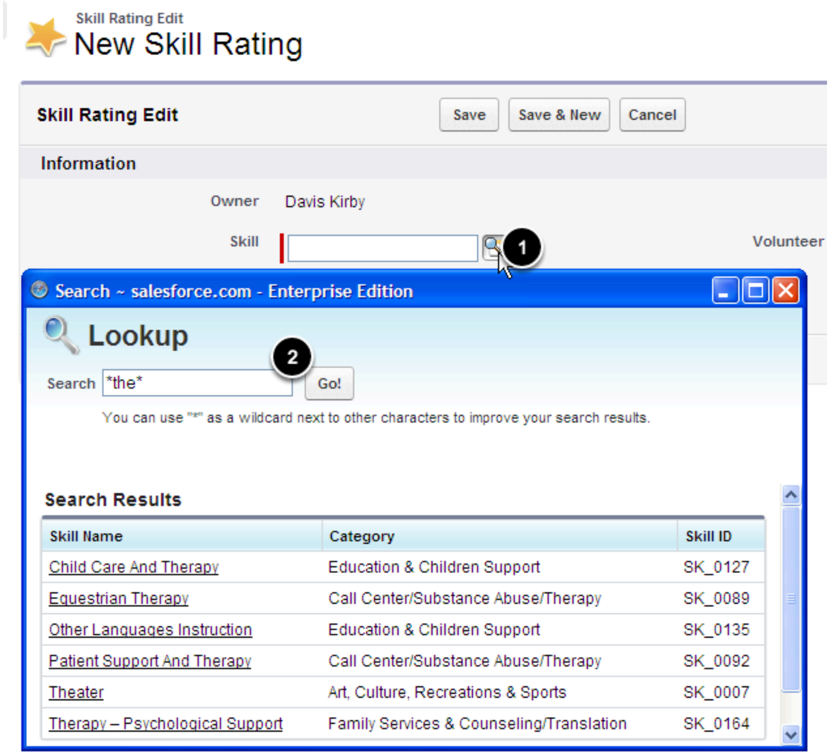
Note: If your organization is not using skills on the HOC public site, or has not defined skills, then you can ignore this related list. Skills are entirely optional for volunteer opportunities.

You can also create a Skill Rating for a Volunteer Opportunity



Click on the New Skill Rating button.

Search for the Skill

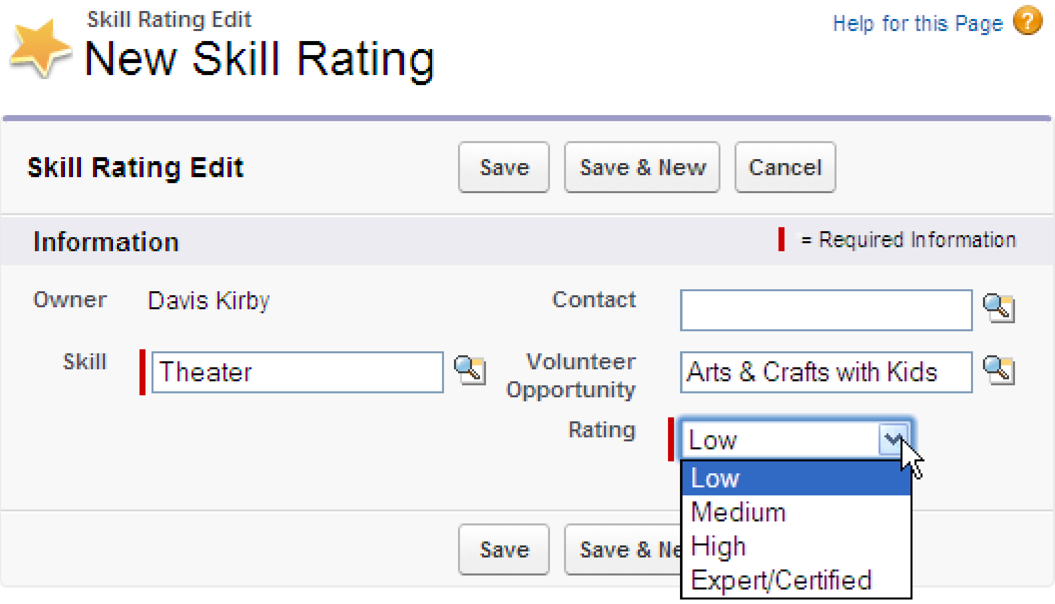


Use the LookUp Button (1) to find a Skill listed in your system. (Speak with you system Administrator about adding a skill, if you do not see what you need - they can add additional skills and skill categories)

In the new window, search for the skill. Use the wildcard to get as many results as possible (2). We were looking for anything that had "the" in it, so we used *the*.

(You may find it useful to run a report that gives you a listing of all the existing skill names)

Fill out the other required field: Rating



Since we came from the Opportunity in this case, we are going to leave Contact Blank, and you see that Volunteer Opportunity is auto-populated. If we came from a Contact, the inverse would be true.

Click Save at the top of the screen and you have created a new Skill Rating for this Opportunity

Skills are just used for search on the public site. If you wish to REQUIRE a skill as a restriction for signing up for the opportunity, you need to set the field value of "Skilled Volunteer Required" to YES in the volunteer opportunity layout.

Custom Questions for Volunteer Opportunities

Users of the Advanced Registration System (ARS) add-on for HandsOn Connect can skip this section. The ARS has a more robust and powerful interface for adding additional questions to the volunteer opportunity sign-up process. For more information on the ARS click here and/or contact your HOC sales or support rep.

If you don't have the ARS add-on - Volunteer Opportunities can ask "custom questions" as part of the sign-up process.

If you'd like to get more information from a volunteer when they sign-up or express interest in an opportunity, create 'questions' that will appear as part of the sign-up for that specific Volunteer Opportunity.

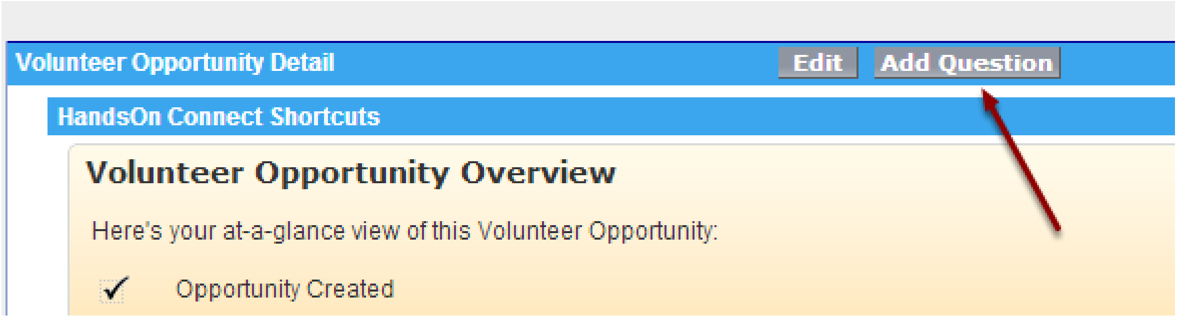
The answers to custom questions appear as a related list to the connections that are made.

Note: Custom Questions can not be added to Individually Scheduled Opportunities of registration type "Express Interest with Schedule".

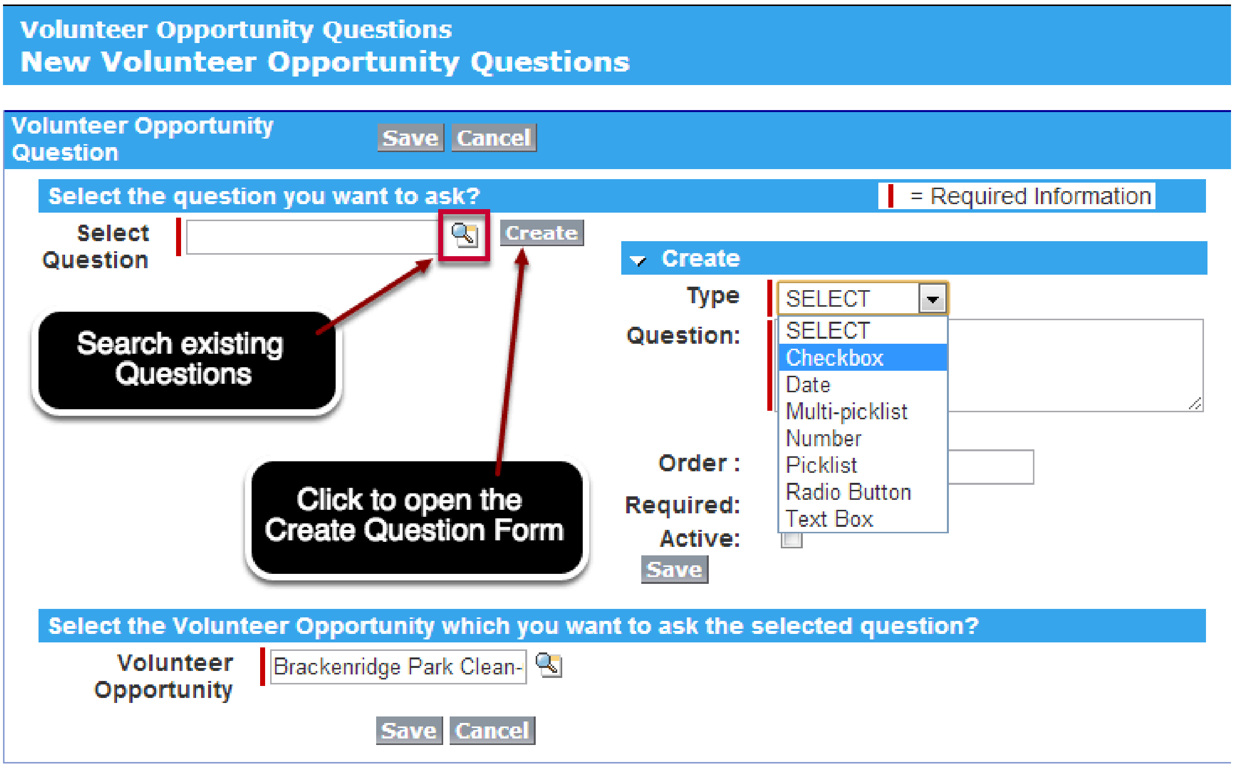
How to add a custom question

Click on the "New Volunteer Opportunity Question" button to open up the Question edit screen.

Some pages may also have an "Add Question" button at the top of the page which may also be used to open the Question edit screen.



Select or Create your question

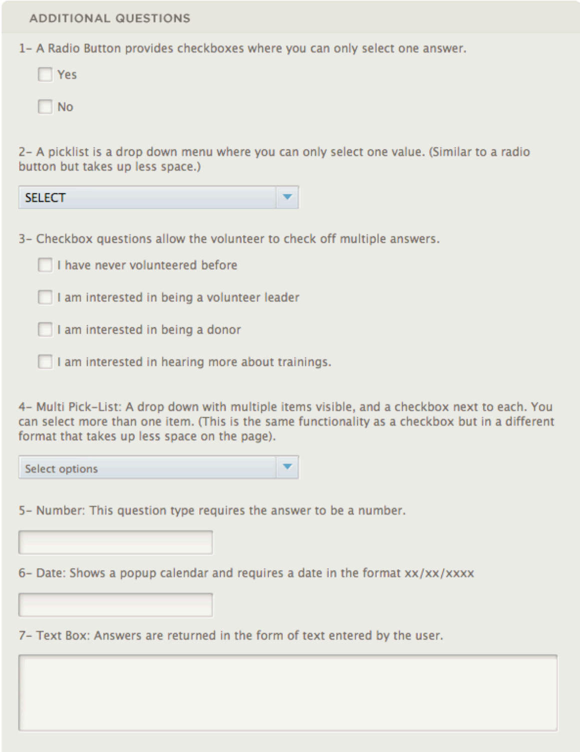


By default, the Volunteer Opportunity you were viewing will be auto-populated. This is the opportunity the question will be associated with.

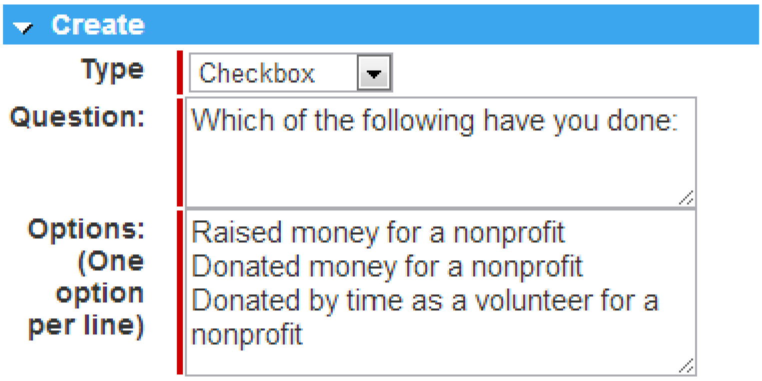
You can then select an existing question that you have previously created using the "Select Question" lookup or you can click on the "Create" button to create a new question.   NOTE: The "Create" button will be found on the far right side of the page.

If you are creating a new question, you need to first select the TYPE you want to use:

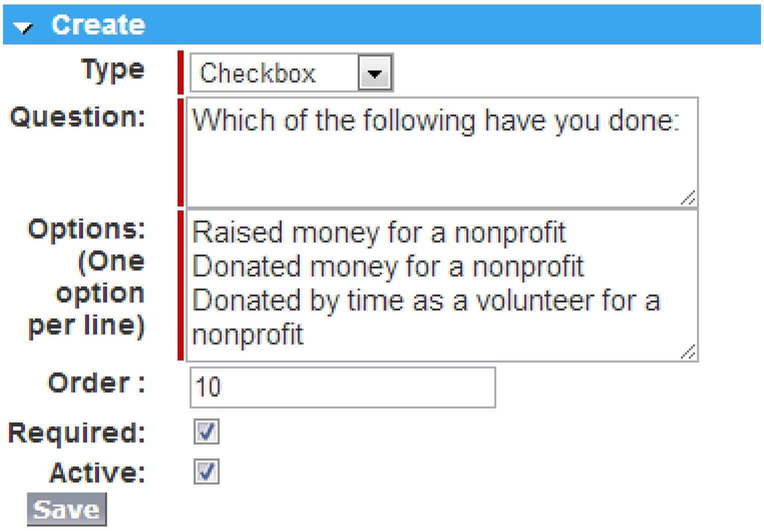
Question Types Defined:



State the Question and the options available as answers:



Set the order, and whether it is required and active



Order: Place a number here. Multiple questions with the same opportunity will be placed in the order based on the contents of this field. (We recommend making the first question 10, second 20 etc... so that if you decide to add a question later that falls between them you can make its order "15".

Required: if checked, the question is not optional, and signup can not be completed until the questions has a response to it. It will appears with an asterick (*) next to the question number.

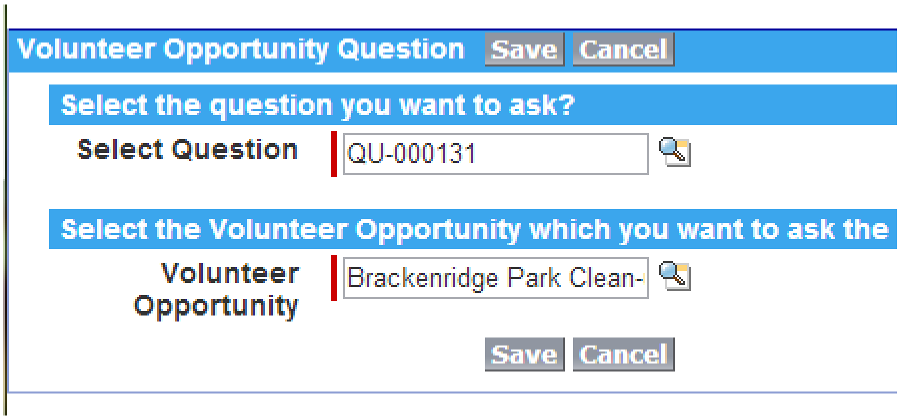
Active: Check this box to make the question active with the opportunity. If unchecked, the question will no longer appear. (This is used instead of deleted questions, because you may have answers associated with this question from earlier occurrences).

Click SAVE to save your custom question.

NOTES:

- Once you select a question type it cannot be changed. If you need to select a different type, then make the current question inactive and create a new question with the desired type.
- The answers in the text field are limited to 255 characters (including spaces). If using a multi-select option such as checkboxes the response selected will truncate at 255 characters.

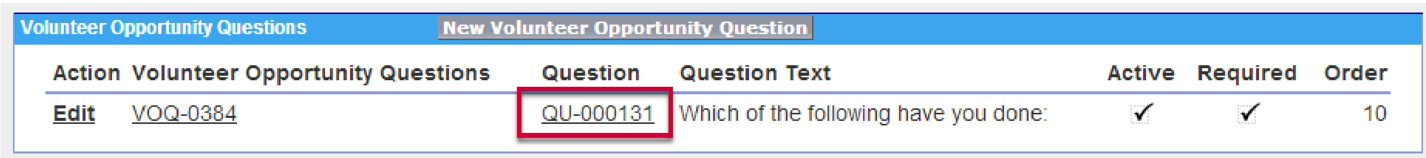
Saving your Volunteer Opportunity Question



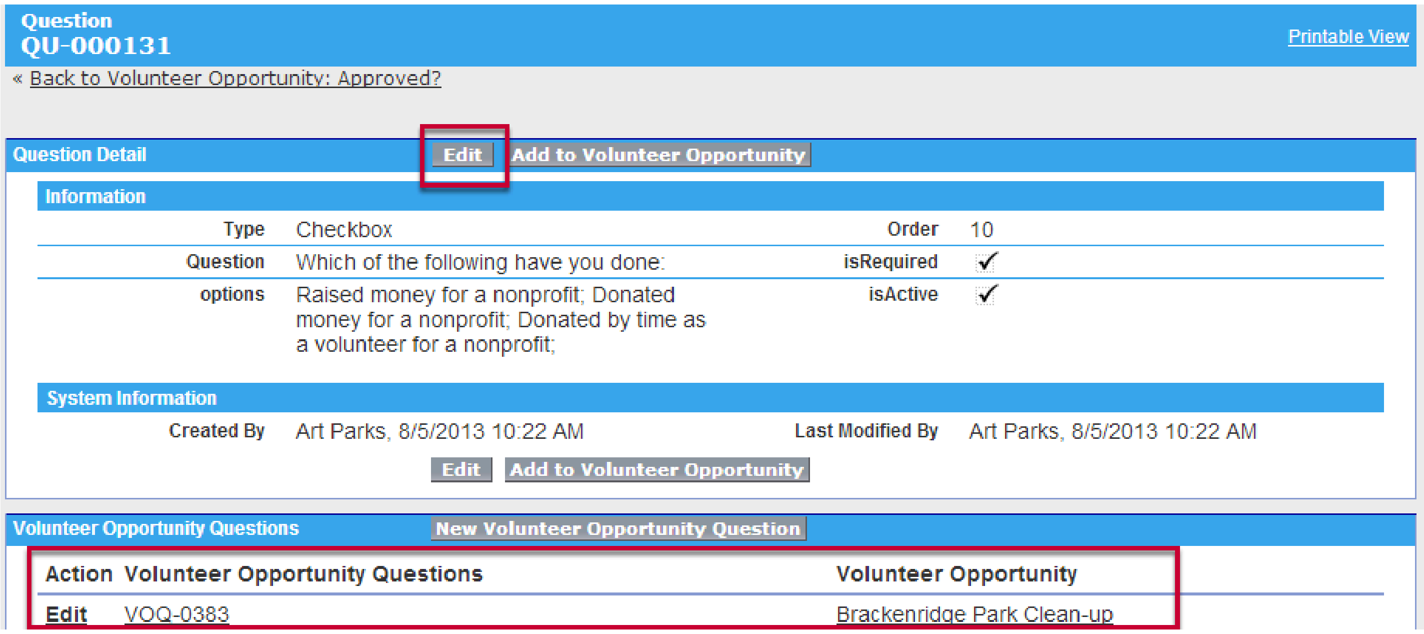
If you opt to create a new Question, once you have saved it the Question ID (QU-######) will be populated in the "Select Question" field.

Once both the Select Question and Volunteer Opportunity fields are populated, you can then click Save to add the custom Question to the Volunteer Opportunity.

Editing Questions



If you need to edit an existing Question, you can go to the Volunteer Opportunity Questions list and click on the "QU-######" link.



From the Question detail page, you can see the Volunteer Opportunities that are currently using the Question.

You can click Edit to make the following changes:

- Question Text
- Options
- Order
- Required
- Active

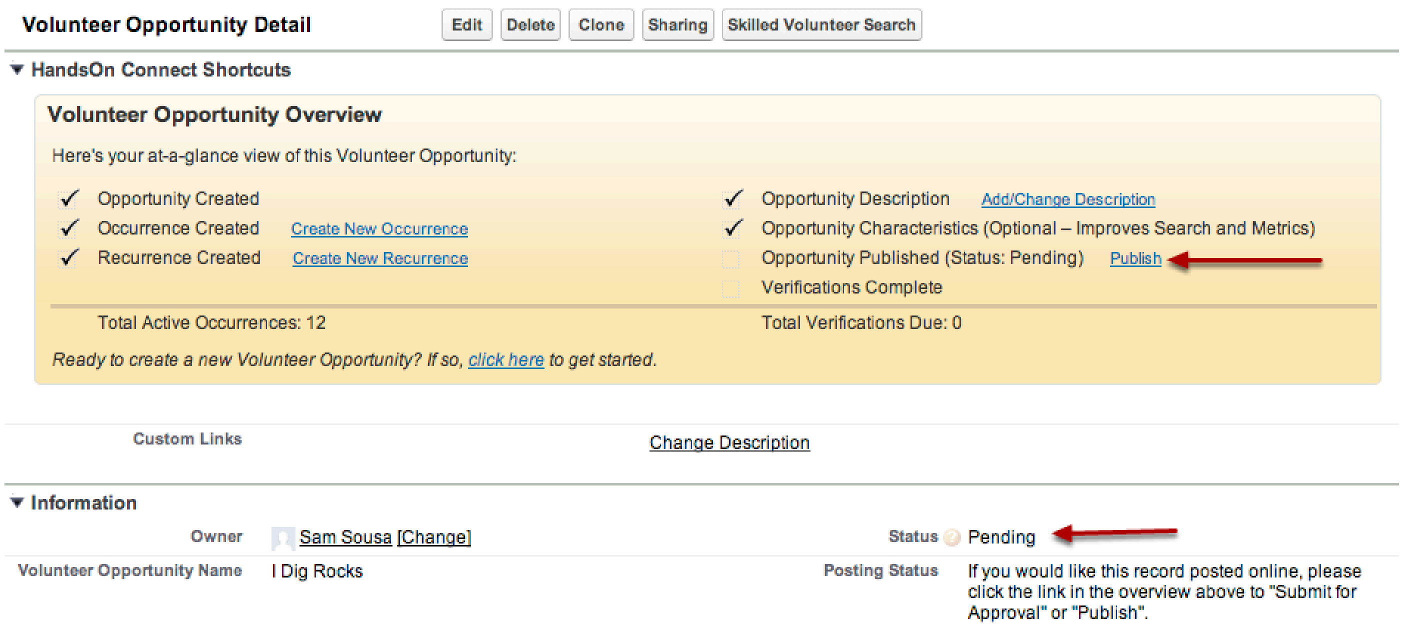
NOTE: Once you select a question type it cannot be changed. If you need to select a different type, then make the current question inactive and create a new question with the desired type.

Keep in mind that if the same question is being used as a Volunteer Opportunity Question for other opportunities, any change to order, required or active will also affect the other volunteer opportunities associated with the question. So edit with care. (You may find it easier to create a NEW question if this question is the current question is used by more than one volunteer opportunity).

Publishing a Volunteer Opportunity

Publishing and Unpublishing an opportunity

After you have created a Volunteer Opportunity using the Volunteer Opportunity Wizard and optionally added detail by adding [Opportunity characteristics, metrics and restrictions](), you are ready to publish the Volunteer Opportunity



"Publishing" an opportunity makes it active on the public website. To publish, just click on the "Publish" hyperlink in the Volunteer Opportunity Overview dashboard. When first publishing an opportunity, it will also automatically publish any occurrences that were created along with it via the Volunteer Opportunity Creation Wizard.

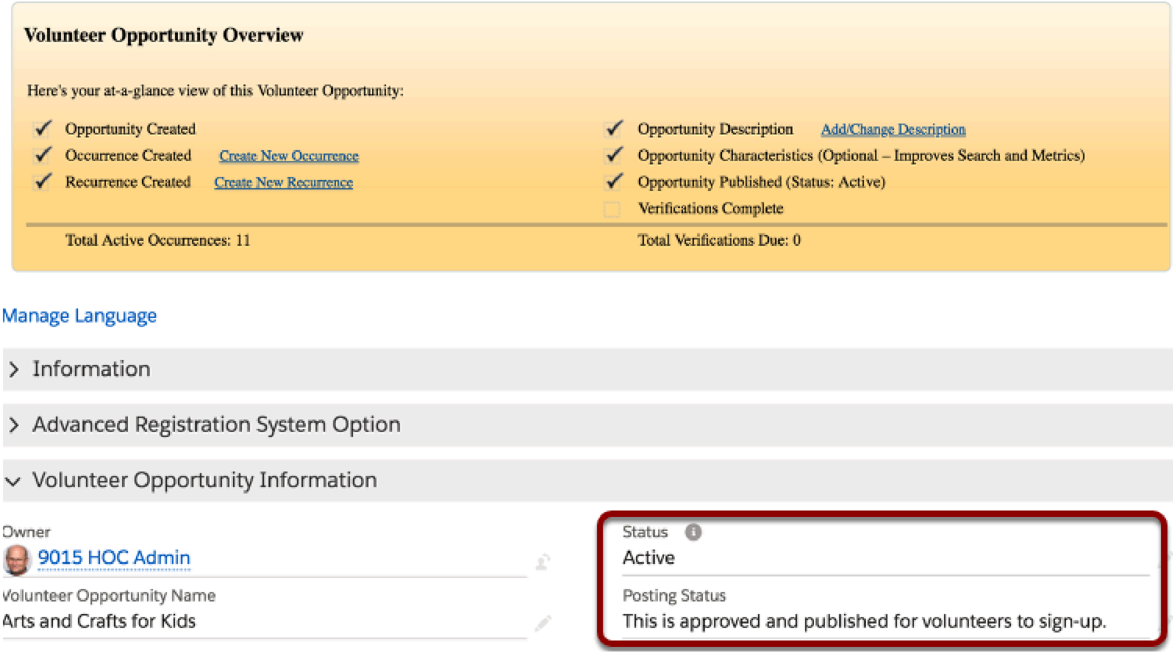
Note: If you do not have the required items 'checked off' in the dashboard - you will not be able to publish. You CAN publish with only a minimal amount of Opportunity Characteristics populated, but we recommend that you fill out as much of this detail as possible BEFORE publishing the opportunity.

After you click on publish - the status will change to ACTIVE, and the Posting Status will indicate the date the Volunteer Opportunity was approved and published.

NOTE: Clicking on Publish will automatically change the status to active, notify partner organizations that the opportunity has been approved (if partner managed), and change the status of pending occurrences to Active. (If you just change the "status" field -- the other automations will not take place. So use the PUBLISH link!

Opportunities appear on the website when it is active, and

has at least one active occurrence



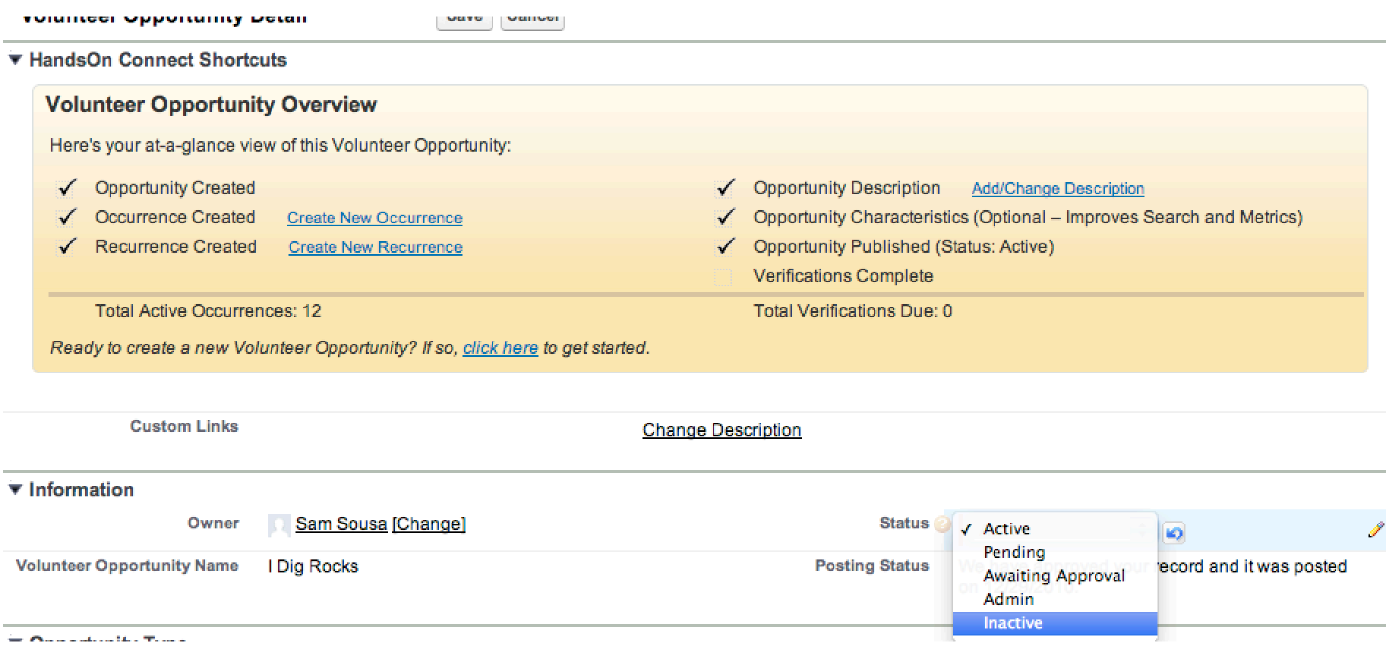
A published opportunity will show as having a status of 'Active'. The Posting status will give you additional detail about whether its visible on the public site or not. (For example, once there are no active occurrences, it may still be active, but won't show up on the public site.

For Individually Scheduled opportunities it will continue to appear on the site until the Opportunity End Date.

For opportunities with date and time specific occurrences, it will only appear when there is a future, active, occurrence.

NOTE: Be sure that any occurrences or recurrences are themselves in ACTIVE state. Inactive occurrences will not appear on the site.

Volunteer Opportunity Statuses



A volunteer opportunity should remain in active status if it has ever been published on the website and a connection has been made to it.

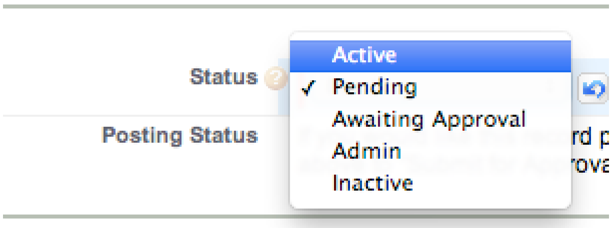
Whether or not the Opportunity is visible depends on the status of the occurrences.

An occurrence with an end date greater than TODAY must exist and be in active status -- otherwise the volunteer opportunity will not appear.

See the next post for best practices on managing the status field AFTER you have published the opportunity.

Best Practices in using the Volunteer Opportunity and Occurrence Status Field

VOLUNTEER OPPORTUNITY: STATUS (picklist values)



AWAITING APPROVAL: The opportunity was created by a portal user, and is awaiting approval for the Opportunity Approval Manager.

PENDING: The opportunity has been created administratively but not yet published.

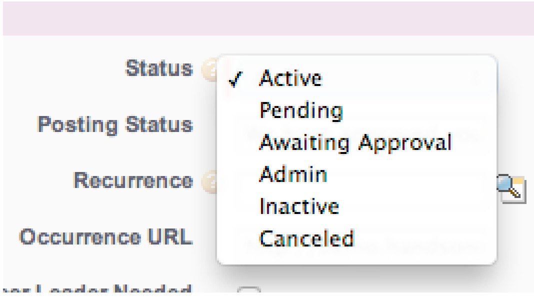
ACTIVE: The opportunity has been approved, with the intention of being published. (It's only visible on the public website if at least one occurrence on a future date is active as well).

ADMIN: The volunteer opportunity never has been available on the public site — however there are (or will be) connections made to its occurrence(s) administratively. (Admin status is used for back-end tracking of connections. No emails are sent to connections related to administrative opportunities.

INACTIVE: This status can be used for Volunteer Opportunities that were created, and never got past PENDING or AWAITING APPROVAL status. (Flagging it Inactive is easier and safer than deleting it). If the status is changed to inactive - it will un-publish the opportunity from the public site even if there are active occurrences.

> There is no need to change the status of an opportunity from Active to Inactive even if its no longer being published. If there are no upcoming connections with an End Date > Today -- even an active opportunity will no longer be published. The POSTING STATUS field is the best field to look at to determine whether or not an Opportunity is currently visible on the public website.

OCCURRENCE: STATUS (picklist values)



AWAITING APPROVAL: The occurrence was created by a portal user, and is awaiting approval for the Opportunity Approval Manager.

PENDING: The occurrence has been created administratively but not yet published.

ACTIVE: The occurrence was approved, and ready to be appear on the public websdite. It will not appear for signup on the public site until the Volunteer Opportunity Status is also in Active Status, or if its date is in the past.

ADMIN: The occurrence is not available on the public site — however there are (or will be) connections to it that have been added administratively. (Used for back-end tracking of connections). Emails are not sent for occurrences in admin sgtatus.

CANCELED: The occurrence WAS published, had one or more connections, but was THEN pulled down from the public site. The decision has been made to Cancel the occurrence and the connections are automatically notified that it has been cancelled. When the status is changed to canceled - an email announcing the cancellation is sent to all existing connections.

INACTIVE: This status is used only for Occurrences that were created, and never got past PENDING or AWAITING APPROVAL status OR for occurrences that were created, published, never got connections, and then the decision was made to not republish them. Making an occurrence inactive is preferable to deleting the occurrence, especially if it has or has had connections to it.

How to control whether an occurrence (and the Volunteer Opportunity description) appears on the public site (Visibility)


Volunteer Opportunities | Search Results:

Click on column header to sort. 154 occurrence(s) returned

OPPORTUNITY ▲	ORGANIZATION	WHERE	TIME	DISTANCE	FREQ.
Adopt a Teen Test	Troutco	Los Angeles	Open	99+ Miles	Ongoing
Apples, Kisses and Shoes	Troutco	Riverside	11-30-12 07:00PM 2 hours	0 Mile	2 More
Art in Texas	Art In Texas, Inc.	Alamo Heights	12-5-12 09:00AM 5 hours	99+ Miles	0 More
Art Mentors	Art In Texas, Inc.	Alamo	12-30-12	99+ Miles	0 More

For an occurrence to appear on the public site all of the following must be true:

Volunteer Opportunity Status = Active

Occurrence Status = Active

End Date and Time of Occurrence >= TODAY

SO: The best practice way to 'unpublisd' or remove an occurrence from appearing on the public site and search is to adjust the occurrence status (NOT the Volunteer Opportunity status).

If there are no occurrences in the future — then nothing will appear on the public site. (The posting status will reflect this)

If you HAVE future occurrences and don't want them to appear on the public site, change the occurrence status of future occurrences to either

• Canceled - if connections were already made and you have canceled that date and time specific occurrence (Note: You cannot cancel an occurrence for an individually scheduled opportunity)

• Pending - if no connections have been made but you think you may want to publish the occurrence at a later date.

• Inactive - if no connections have been made and you want to indicate that it will not ever be published.

The **Posting Status** field will tell you whether or not an opportunity or occurrence is visible on the public site, and if not, why.

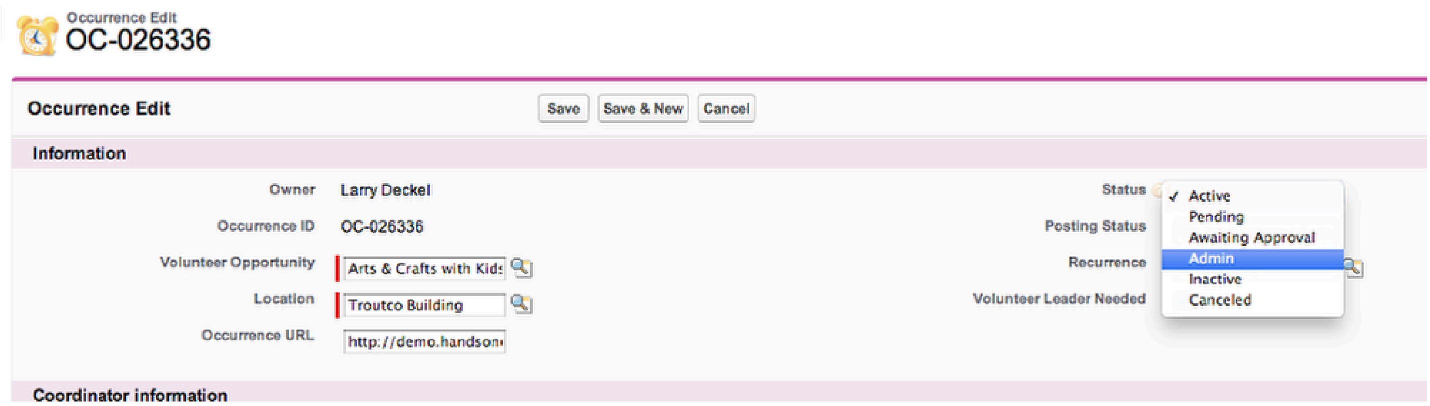
You can create a view or report so you can see what's currently visible on the public site.

Admin Status of Volunteer Opportunities and Occurrences

Sometimes you might want to track volunteer opportunities, occurrences and connections strictly on the back end of the system. This is sometimes true for corporate events where volunteers will not be interacting with the website, but you still want to keep track of who volunteered and how many hours they served.

This can be done by placing a volunteer opportunity and its occurrences in Admin Status.

Using Admin Status



An occurrence that is placed in Admin Status does not appear on the public website. Any connections you make to it will be done administratively on the back end for tracking and reporting purposes.

How Search is Updated after you publish or edit a volunteer opportunity

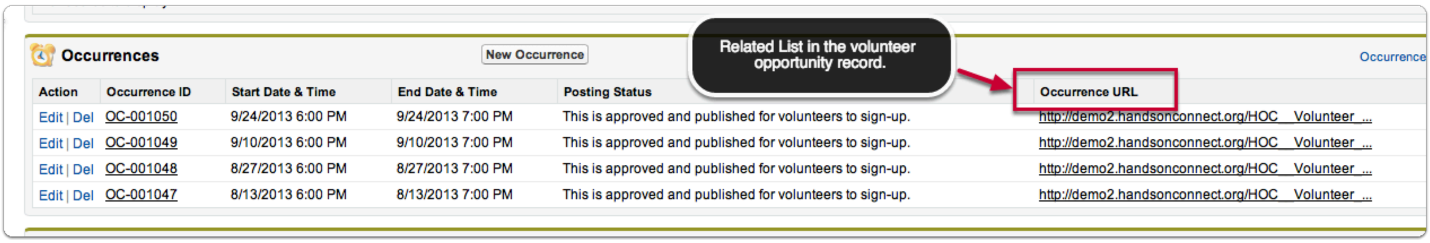
The Search Engine in HandsOn Connect is updated every time a HOC client publishes or updates a volunteer opportunity or occurrence. Typically search results on your search page and calendar will reflect your updates within 10-15 minutes.

At times however, depending on the load on the server, as well as the nature of the change you've made, you may not see the updated listing until the next morning. (Overnight the search server refreshes every search iin every instance as part of its nightly update)

Changing values in a related record, such as the Organization Name or Volunteer Event Name, while updated in Salesforce, do not update the Last Modified Date of the associated Volunteer Opportunities and Occurrences. The change in the Last Modified Date is what triggers the new information to be updated. So if you have edited the Name of the Managing Organization or Organization Served in their related Organization record or the edited the name of the Volunteer Event, please also edit the related occurrences (it can be as simple as Approving/activating the occurrence or editing the Registration cutoff (hours) field) so that the change is sent and updated in the search results.

In any case - the search database is completely updated overnight each night - so you should always see current results the following morning if they haven't appeared previously.

Is it possible to see the opportunity detail page as it will appear - before I can find it in search?



Yes. There is a field available in the page layout for occurrences, and which can be added (or is already present) in the Occurrences related list in the Volunteer Opportunity Record, that is the direct link to the opportunity detail page. The field name is **Occurrence URL.** If you need to make this volunteer opportunity detail page available to volunteers immediately - you can publish or email this URL to volunteers. You can put a link to it on your home page or anywhere in the CMS. Clicking on the link will find the opportunity detail page immediately - even before its available in the search engine.

If this field isn't already present in your related list, or in the occurrence record -- your system administrator can add this to your page layout(s).

What does the keyword field in search actually search against?

Keyword searches will look for matches in the following fields of the volunteer opportunity record:

- Opportunity Name
- Description
- Managing Organization
- Organization Served
- Skill Categories
- Impact Area
- Program Area (local)
- Impact Area (local)

All your volunteer opportunities and occurrences are automatically syndicated to AllForGood.org

Any searches done through AllForGood.org or any of the search engines that are powered by this aggregator, will find any of your 'active' volunteer opportunities. Clicking on a link to these opportunities will bring them back to your instance of HandsOn Connect for more information and to sign up or express interest.

Administrative and/or Invitation Code Required opportunities will not be found via All For Good or in your public site search results (except when entering an invitation code as a search parameter on your public site.)

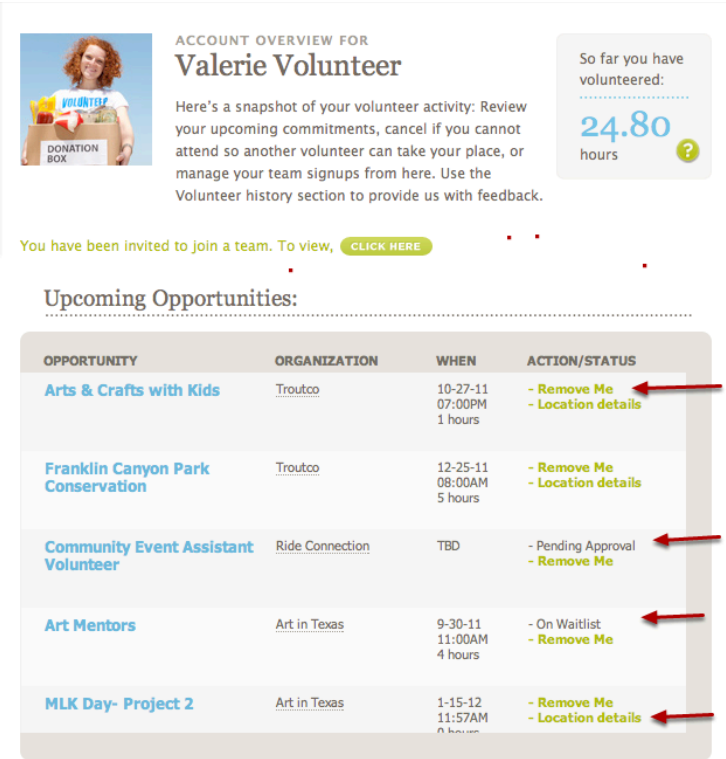
AllforGood.org also offers its feeds to other national search engines -- so your opportunities may be found in a number of searches across the web. Wherever they are found - the actual signup will take place on your public site and be added to your data in HandsOn Connect!

The Volunteer Opportunity sign-up process

What happens during opportunity signup?

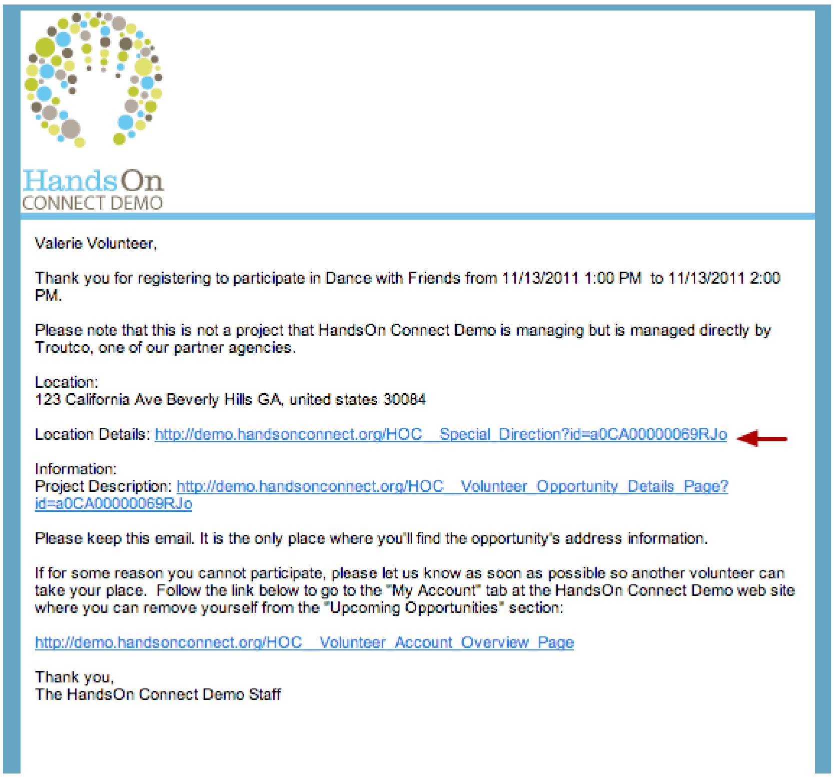
The following processes happen automatically when a volunteer signs up or expresses interest in an opportunity on the public website:

The following occurs for the volunteer:



• Their "My Account" page is updated and the new Volunteer Opportunity is listed in the Upcoming Opportunities section. Their are links here to remove oneself from the opportunity, manage team sign-ups (if acting as team captain who signed up multiple team members), and the status of 'express interest' opportunities is reflected. There are also indications if you are on the waitlist for an opportunity, and for confirmed opportunities, links to a webpage with full details on the location of the volunteer opportunity (address, special directions, and a google map from which you can get driving directions).

A confirmation email is sent to the volunteer with the Volunteer Opportunity details



HandsOn CONNECT DEMO

Valerie Volunteer,

Thank you for registering to participate in Dance with Friends from 11/13/2011 1:00 PM to 11/13/2011 2:00 PM.

Please note that this is not a project that HandsOn Connect Demo is managing but is managed directly by Troutco, one of our partner agencies.

Location:
123 California Ave Beverly Hills GA, united states 30084

Location Details: http://demo.handsonconnect.org/HOC__Special_Direction?id=a0CA00000069RJo

Information:
Project Description: http://demo.handsonconnect.org/HOC__Volunteer_Opportunity_Details_Page?id=a0CA00000069RJo

Please keep this email. It is the only place where you'll find the opportunity's address information.

If for some reason you cannot participate, please let us know as soon as possible so another volunteer can take your place. Follow the link below to go to the "My Account" tab at the HandsOn Connect Demo web site where you can remove yourself from the "Upcoming Opportunities" section:

http://demo.handsonconnect.org/HOC__Volunteer_Account_Overview_Page

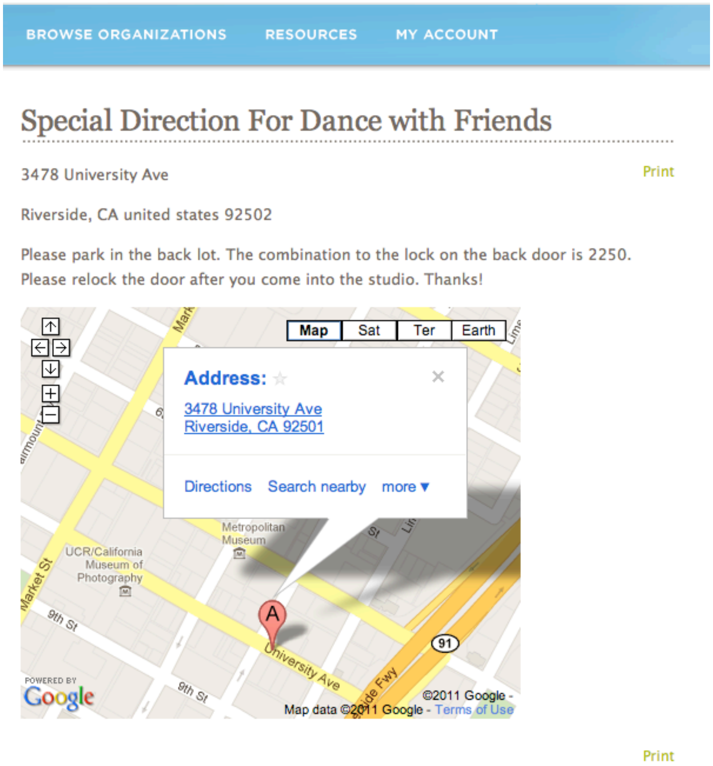
Thank you,
The HandsOn Connect Demo Staff

It includes a link to remove themselves if needed, and a link to a webpage where they can get complete location details including the full address, a google map they can get directions from, and any special instructions that are populated as part of the Location record associated with this occurrence.

Different confirmation emails are sent depending on the type of Volunteer Opportunity they have signed up for. The example above is for a date and time specific opportunity with full signup. It is managed by a partner organization.

There are different emails for each opportunity type, and different emails if the opportunity an affiliate-managed opportunity.

View of the Location Details webpage:



They receive a reminder of their sign up four days before the Volunteer Opportunity occurs.

Dear Art Trout,

This is a reminder that you are registered to participate in **Arts and Crafts for Kids** from **10/5/2018 7:00 PM** to **10/5/2018 8:30 PM**.

Location:
6321 Lemon St Riverside CA, United States 92506

Location Details:
https://ps9015.handsonconnect.org/special-direction-page/a0C1N00000OK8v4

Project Description: https://ps9015.handsonconnect.org/opportunity/a0C1N00000OK8v4

Please keep this email. It is the only place where you'll find the opportunity's address information.

If you have questions about this opportunity, please contact:

Opportunity Leader:
Larry Secondo: troutco+9015@gmail.com

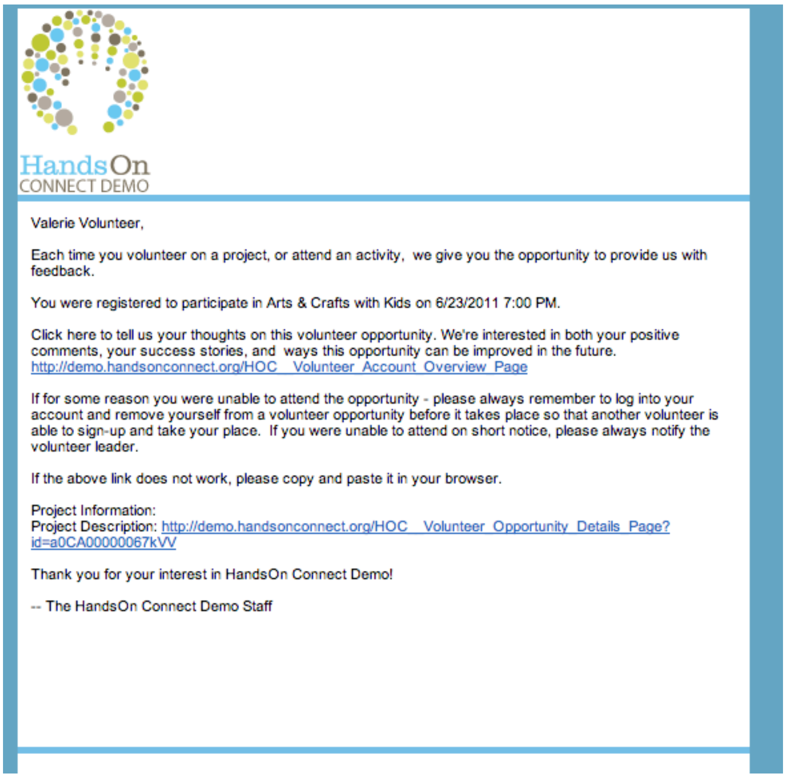
If for some reason you cannot participate, please let us know as soon as possible so another volunteer can take your place. Follow the link below and use the Log In button in the upper right hand corner. Then, go to the "My Account" tab where you can remove yourself from the "Upcoming Opportunities" section:

https://ps9015.handsonconnect.org/

We look forward to seeing you there!

-- The HandsOn Connect 9015 Staff

They receive a thank-you email and a request for feedback the day after they are scheduled to attend.



Valerie Volunteer,

Each time you volunteer on a project, or attend an activity, we give you the opportunity to provide us with feedback.

You were registered to participate in Arts & Crafts with Kids on 6/23/2011 7:00 PM.

Click here to tell us your thoughts on this volunteer opportunity. We're interested in both your positive comments, your success stories, and ways this opportunity can be improved in the future.
http://demo.handsonconnect.org/HOC__Volunteer_Account_Overview_Page

If for some reason you were unable to attend the opportunity - please always remember to log into your account and remove yourself from a volunteer opportunity before it takes place so that another volunteer is able to sign-up and take your place. If you were unable to attend on short notice, please always notify the volunteer leader.

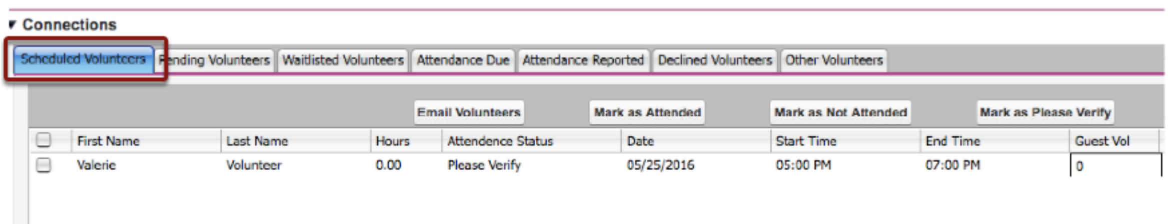
If the above link does not work, please copy and paste it in your browser.

Project Information:
Project Description: http://demo.handsonconnect.org/HOC__Volunteer_Opportunity_Details_Page?id=a0CA00000067kVV

Thank you for your interest in HandsOn Connect Demo!

-- The HandsOn Connect Demo Staff

The following occurs on the administrative side

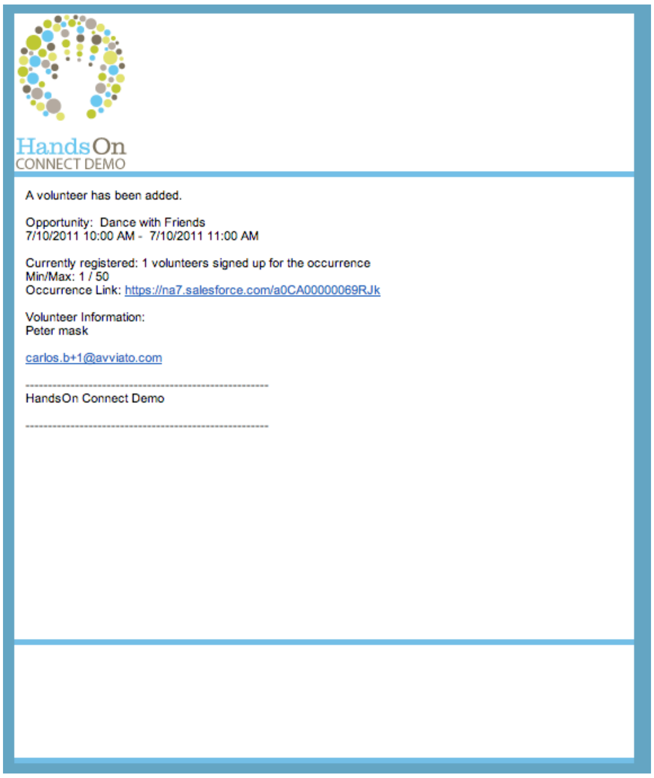


The Connections Grid is updated to show the new connection.

For **Sign-Up** opportunities - the connection automatically appears in the Confirmed Connections Section.

For **Express Interest** opportunities - the connect will appear in the pending/declined connections section.

The Opportunity Coordinator is sent a notification that a sign-up has occurred.



For Individually Scheduled opportunities - a different email is sent to the Opportunity Coordinator

Email sent for Individually Scheduled Opportunity (ISO) with schedule:

Angie Trout, a volunteer registered with HandsOn Connect 9015 has reviewed the dates and times you need volunteers for your volunteer opportunity, Clerical Help Needed (EIO - with schedule), and has expressed interest in volunteering for one or more date(s).

Please log into your account at https://ps9015.handsonconnect.org/ and review the date(s) and time(s) this volunteer has made themselves available.
After logging in go to this page, https://ps9015.handsonconnect.org/partner-portal/volunteer-opportunity-details/a0N1N00000Kij1E and review all the pending connections for this volunteer.

For each proposed date and time, you can confirm, decline or reschedule the volunteer, and then they'll know whether or not they are confirmed to volunteer for each date, and be able to see their approved schedule when they log into their account.

You'll also be able to view which volunteers you have scheduled for each day from this page, so you'll know who is volunteering with you and when.

Thank you,

The HandsOn Connect 9015 Staff

For HandsOn Connect 9015 Use Only: https://ps9015.handsonconnect.org/partner-portal/volunteer-opportunity-details/a0N1N00000Kij1E

Email sent for Individually Scheduled Opportunity - Express Interest Only

A volunteer registered with has expressed interest in your volunteer opportunity Board Members Needed (ISO EIO).

Volunteer Information:
Angie Trout
+19517803609
troutco+angie@gmail.com

No action is required on your part, however if you want to schedule the volunteer you can do so by logging into your account at

Thank You,
The Staff

For Use Only:
a0C1N00000Pfy2S

For '[express interest]' opportunities the opportunity coordinator receives email notification that they should log into their account and review the connection. For Date and Time Specific Express Interest, and ISO - Express Interest with schedule, they should confirm or decline the connections and can contact the volunteer if necessary to reschedule. For ISO - Express

Interest Only - they do not have to take any actions since the purpose of this opportunity type is just to see who is interested. They can contact volunteers, and can schedule them administratively if they desire.

The text of all these emails can be updated by your system administrator - to change the tone or messaging.

Occurrences

Opportunity Coordinators and Volunteer Leaders - what's the difference?

Before we start looking at occurrences -- its important to understand the distinction between the Opportunity Coordinator and a Volunteer Leader.

So what's the difference?

The Opportunity Coordinator is the one person designated as the lead in managing the volunteers for a given occurrence.

IF the Opportunity Coordinator is a volunteer who has the Volunteer Leader Profile -- then the Opportunity Coordinator is also connected to the occurrence as a Volunteer Leader.

The Opportunity Coordinator

Whoever is in charge of the Volunteer Opportunity is designated as the Opportunity Coordinator.

As a matter of good business practice, the opportunity coordinator field lookup only finds contacts that have had portal access granted.

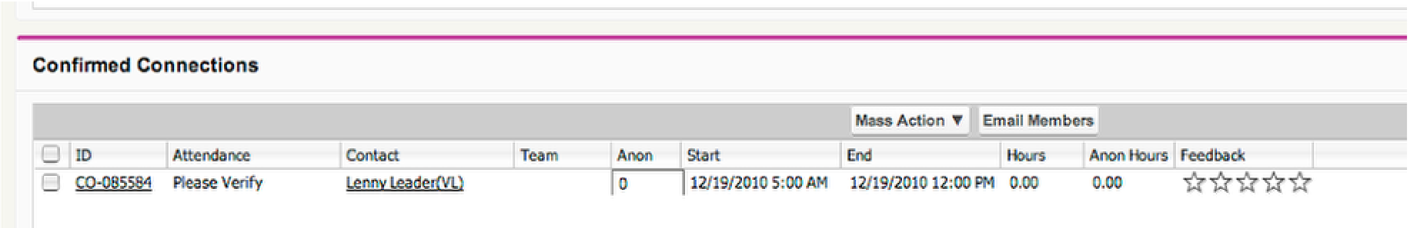
Typically Opportunity Coordinators should be either Partner Staff or Volunteer Leaders (who have access to manage volunteers and report attendance through the Customer Portal).

For partner projects, this is typically someone on their staff, and hence they are not a volunteer. So they are strictly designated as the Opportunity Coordinator.

The Opportunity Coordinator who is designated in the Volunteer Opportunity record is considered the 'default' coordinator for all occurrences created in relation to it.

The default Opportunity Coordinator can be edited at the Occurrence level if different people lead different occurrences.

Opportunity Coordinators who are Volunteer Leaders



When the Opportunity Coordinator you assign to an occurrence has a volunteer leader profile, and it is an affiliate managed opportunity -- the system automatically creates a connection (sign-up) for this volunteer, and designates this person as the Volunteer Leader (VL)

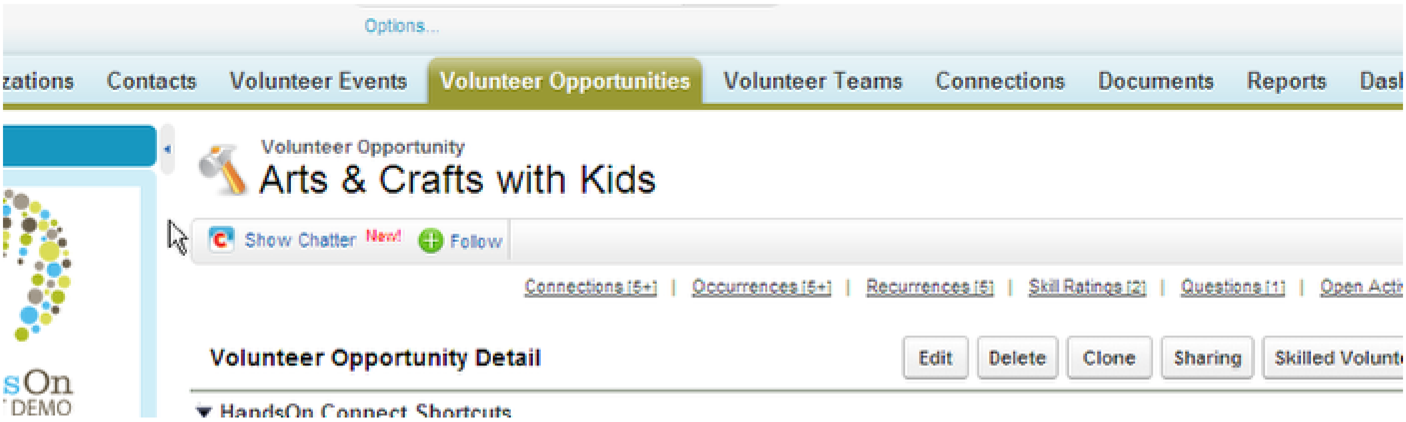
You can assign additional Volunteer Leaders to an affiliate-managed occurrence - but only one is designated as the Opportunity Coordinator.

Creating an Occurrence

For "Individually Scheduled" opportunities - the only occurrence you'll need will be automatically created when you use the volunteer opportunity wizard. All connections are tracked in the one occurrence record.

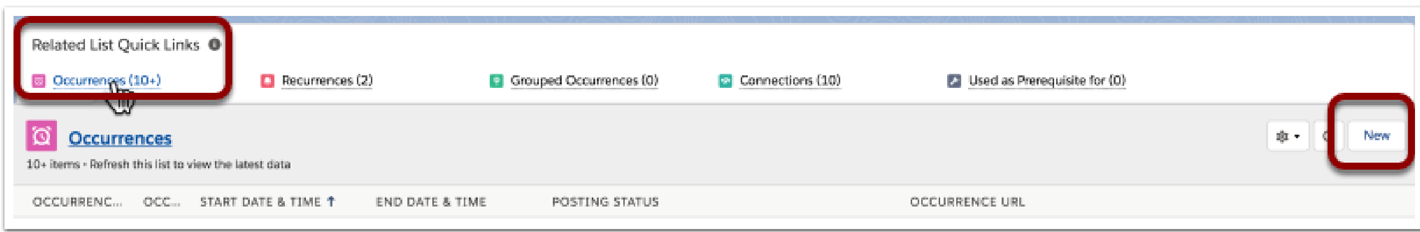
For date and time specific opportunities, the wizard will allow you to create one or more occurrences for each date and time you wish to recruit volunteers for. You an always add additional date and time specific occurrences to an existing date and time specific volunteer opportunity. Here's how:

Navigate to the Volunteer Opportunities Tab.

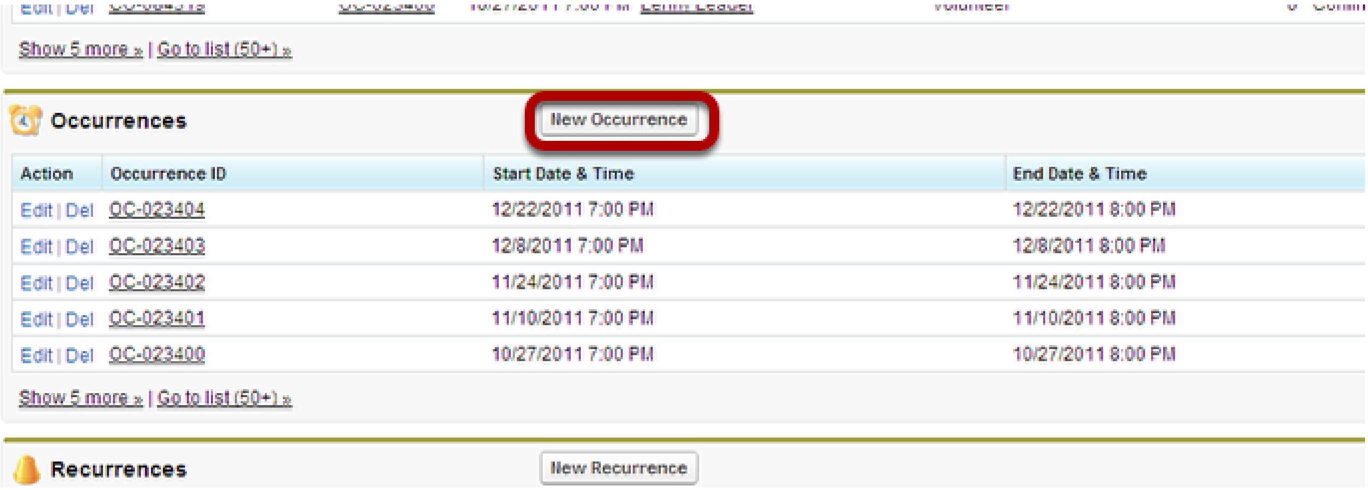


Choose the Volunteer Opportunity to which you wish to add the occurrence.

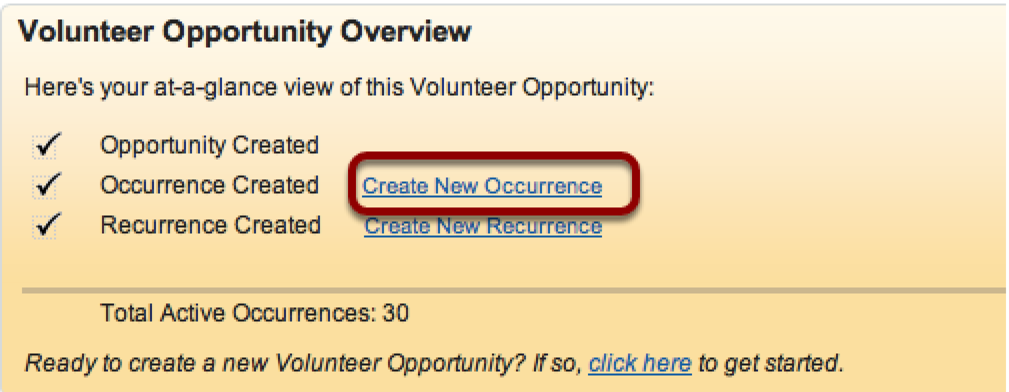
(Lightning) Select the Occurrence Related List and click on the New Button



(Classic) Scroll down to the Occurrences section of the page and click the "New Occurrence" button

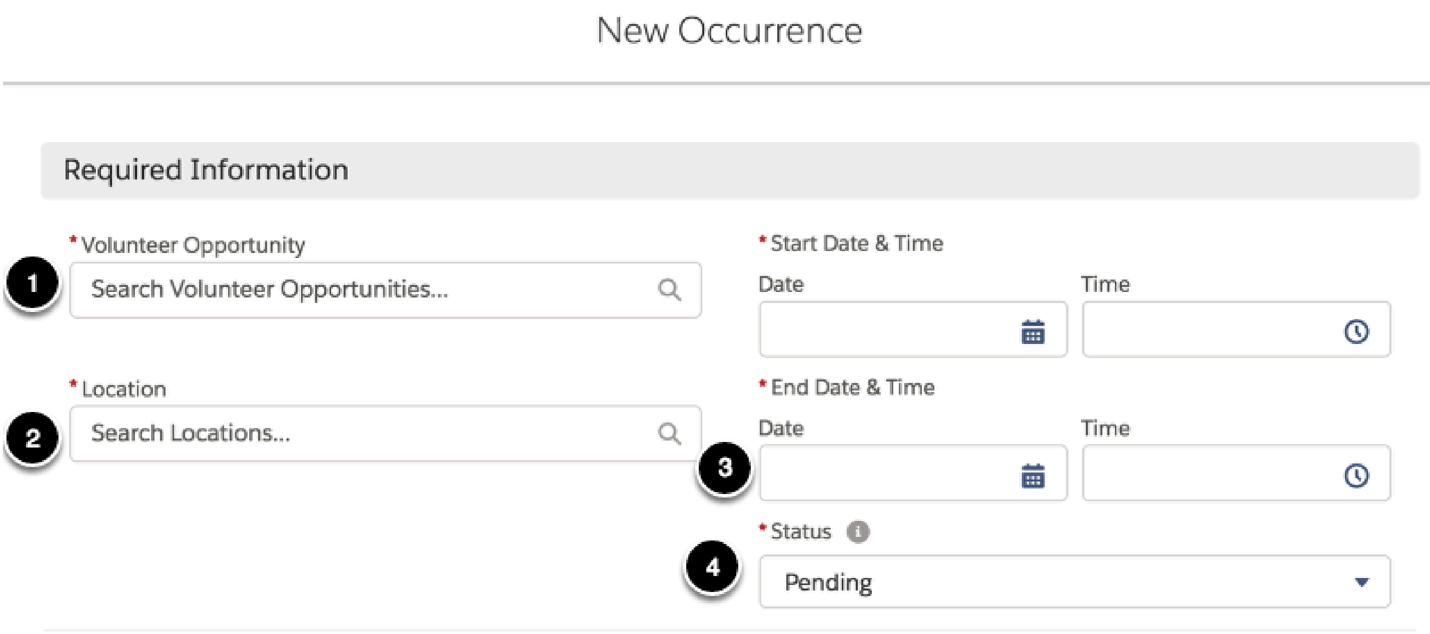


You can also opt to select new occurrence from the Create New Occurrence Link in the Volunteer Opportunity Overview



There are only a few fields you need to populate to create a new occurrence

Items 1 - 4 below are required. To quickly create an occurrence - just fill out these four fields. Everything else in the record is optional!



Note: Your page layout may vary depending on whether you've enabled certain advanced features and/or custom fields. But whatever the layout - only these four fields must be populated to create a new occurrence. Everything else will be automatically filled in for you or is optional.

The required fields are at the top of this layout.

1. Volunteer Opportunity (required): Put in the name of the volunteer opportunity (if you used the related list button this may be automatically filled in for you). Use the lookup icon to select the correct volunteer opportunity name.

2. Location (required): Use the lookup to find the location of this occurrence. (If the location isn't already created, you'll need to create a location record first in the locations tab)

3. Start Date & Time / End Date & Time must be filled in. (In classic, this is one field for date and time and it should be formatted as shown on the right of field. (click on the field to popup a calendar and choose the date.

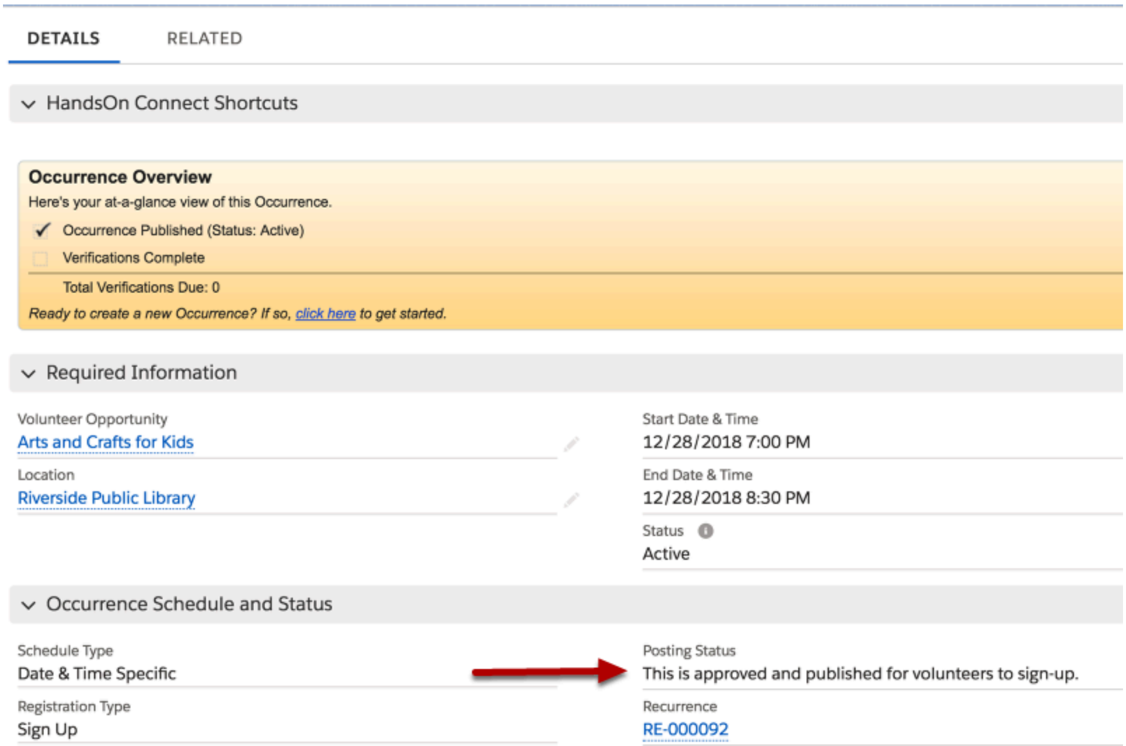
4. Status (Required): Choose a Status from the picklist.

- Active means it will be on public website (once volunteer opportunity is published
- Pending means you've created the occurrence but don't want it to show up on the website, YET
- Awaiting Approval means it was added by a partner, and you have to approve it to publish this new occurrence
- Admin is for occurrences you never mean to have show up on the public site
- Inactive (means it has been archived or retired -- never meant to show up on the site again
- Canceled means the occurrence HAD been active, but has since been canceled.

All the other fields in the occurrence record can be left blank if you want the default information from the volunteer opportunity to be automatically filled in for you. OR - you can choose to manually enter different information for Opportunity Coordinator, Min and Max Attendance, Registration cutoff and start date, etc. (See below)

But at this point - you can click Save and your occurrence will be published IF the occurrence is saved in ACTIVE status, and the volunteer opportunity is already active.

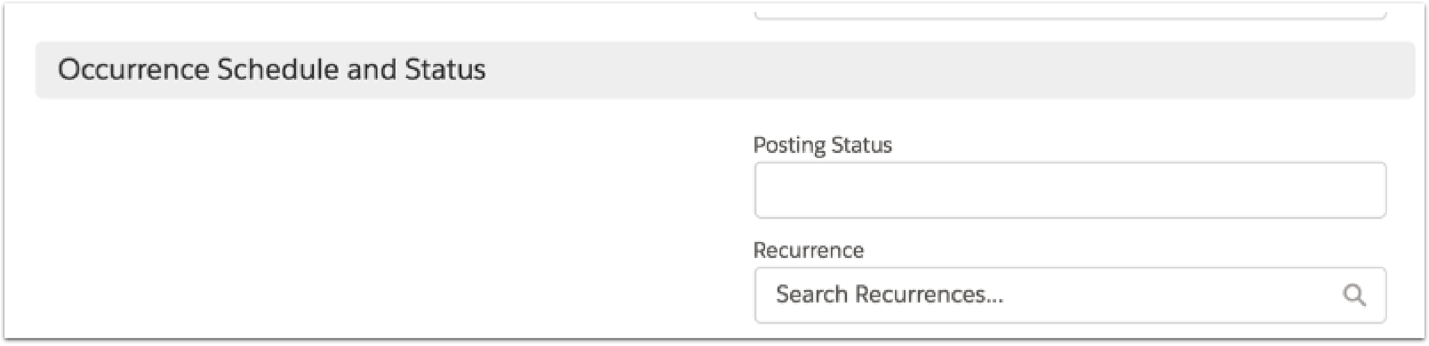
After clicking SAVE



Note that the posting status was updated automatically.   You can now edit the record if you wish to change any of the defaults.

Here is a complete list of other sections and fields in the occurrence record that may or may not appear in your page layout. They are not required but enable additional customization to your occurrence if used.

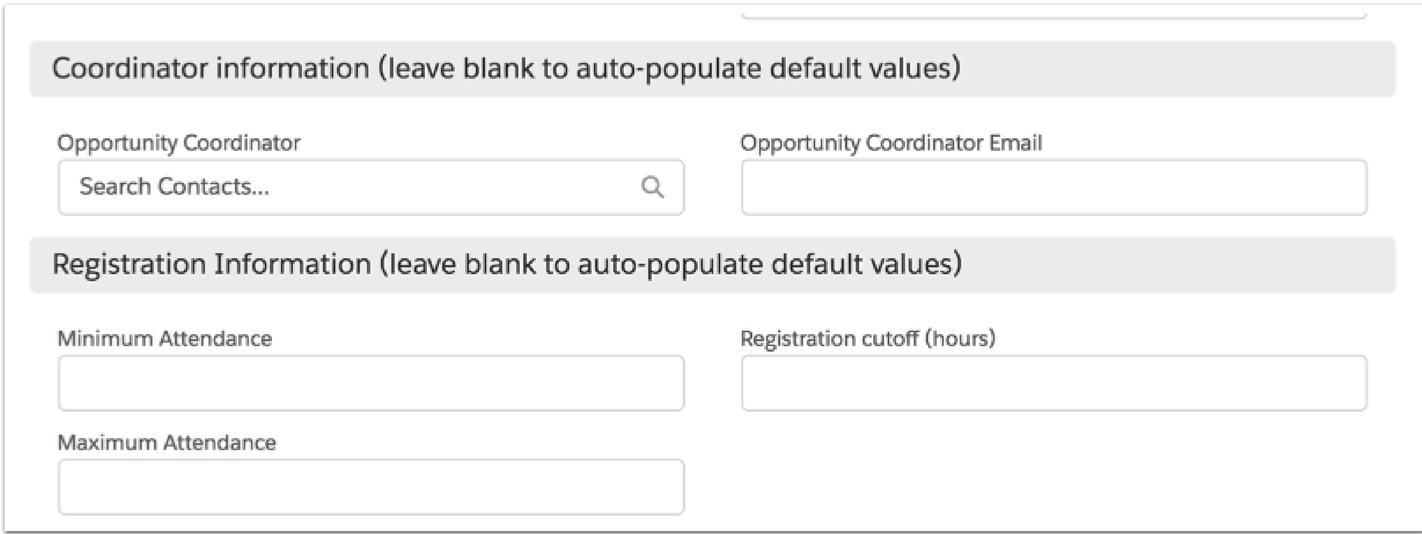
Occurrence Schedule and Status, Coordinator Information and Registration Information



Posting Status: (leave this blank. It will automatically be populated for you based on the status of the occurrence and the volunteer opportunity)

Recurrence: (leave this blank. It will automatically be populated whenever an occurrence is created as part of a recurrence.

The next two sections can be left blank, and the default information from the Volunteer Opportunity will be brought over when the record is saved. If you wish to use values other than the default values for these fields, you can populate them as desired.



You can now SAVE your occurrence (or - fill out advanced and optional features as described below). Once the new occurrence has been saved you can review and publish your occurrence if its not been created in Active Status.

Advanced Features for Occurrences

The sections that follow may or may not have been enabled in your instance of HOC. Your system administrator can make some or all of these features available. If available on your page layout - these are all optional items when creating an occurrence.

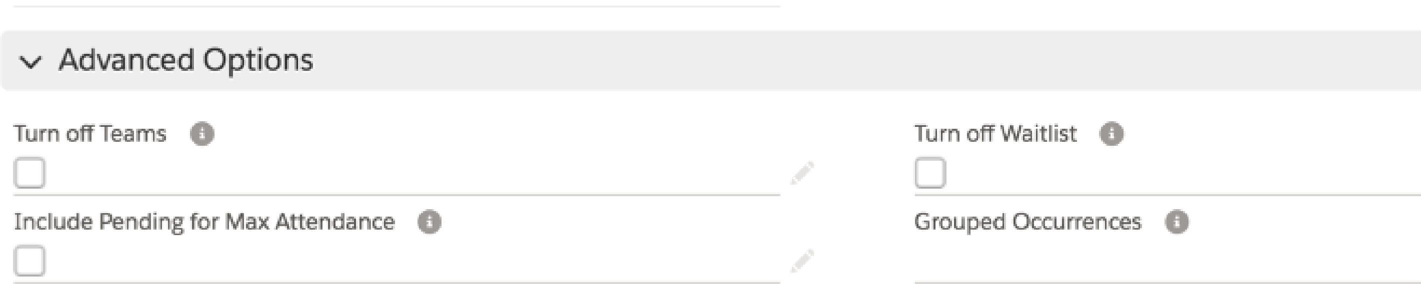
ADVANCED OPTIONS:

Turn off Teams - allows you to prevent teams from signing up for this occurrence.

Include Pending for Max Attendance - used if you wish pending connections to count towards the maximum number of connections that can be made to the volunteer opportunity. Useful in some cases when doing date and time specific - express interest opportunities to prevent too many people from expressing interest.

Turn off Waitlist - turns off waitlist functionality for this occurrence.

Grouped Occurrences: automatically populated if the volunteer opportunity is using grouped occurrences.

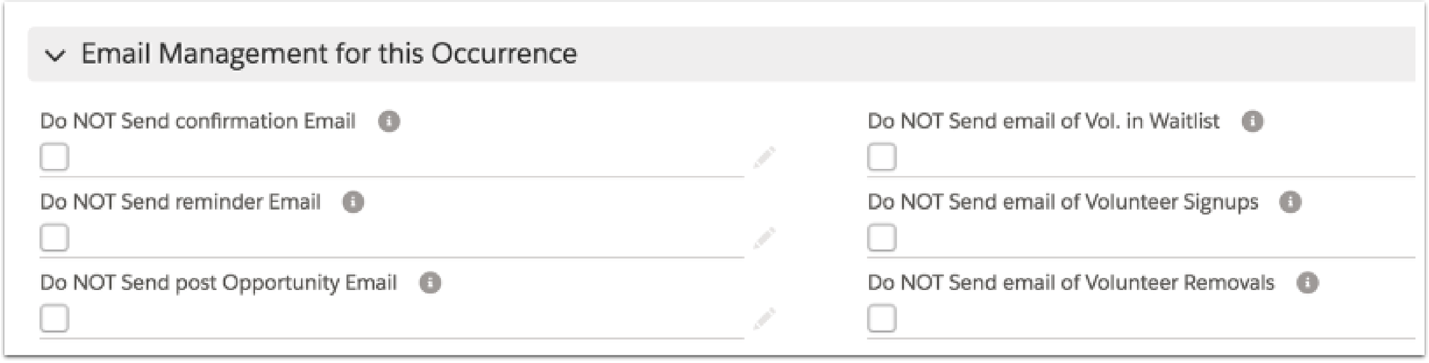


EMAIL MANAGEMENT FOR THIS OCCURRENCE:

The first column of options suppresses one or more of the automated emails sent to volunteers for this occurrence.

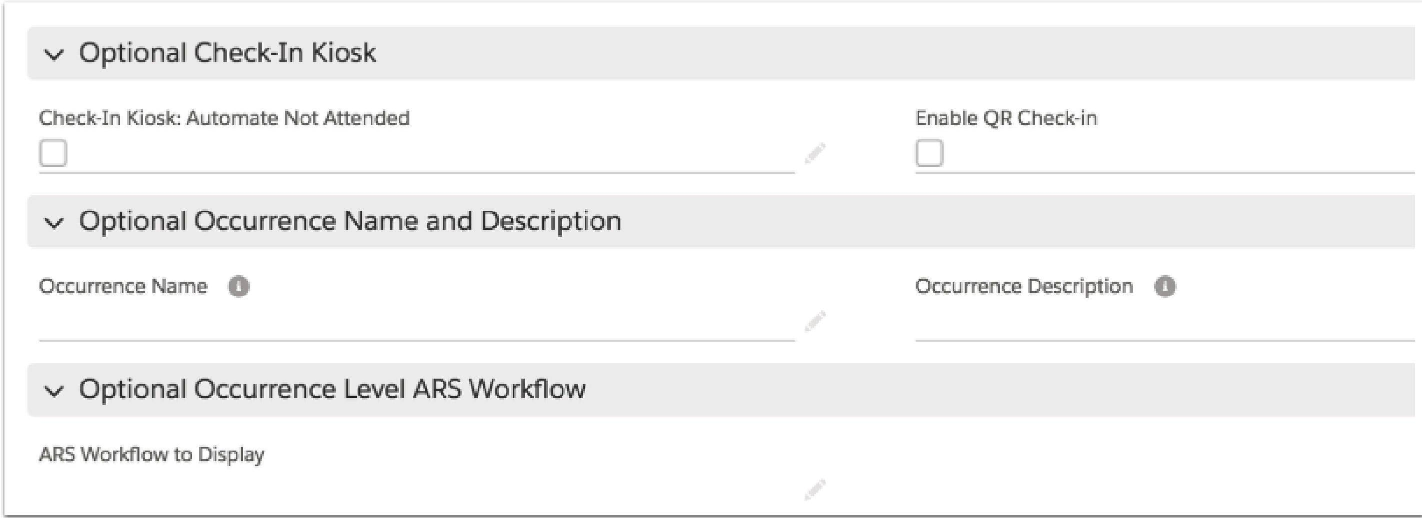
The second column of options suppresses one or more of the automated emails sent to opportunity coordinators for this occurrence.

[See this article for additional information on these emails:]



Optional features for occurrences

These additional sections are optional to use and generally must be enabled by your system administrator.



Optional Check-In Kiosk -- (If your organization has the Check-In Kiosk add-on) checking this box will enable QR codes for the check-in process.

Automate Not Attended - checking this automatically marks attendance to not-attended for anyone who did not check in via the kiosk for this occurrence.

Enable QR Check-In - if you wish to have volunteers print and check-in using QR codes, check this box.

[See this manual for detailed info on these features in the Check-In Kiosk]

Optional Occurrence Name and Description:

This is a feature that allows individual occurrences to have names and descriptions. (useful for identifying shifts and./or roles within an opportunity. See this article for more detail on this functionality:

Optional Occurrence Level ARS Workflow

If you have the Advanced Registration System add-on and wish to have an ARS workflow applied to this occurrence (but not the entire volunteer opportunity), you can place the workflow name here.   See this article for info on the ARS

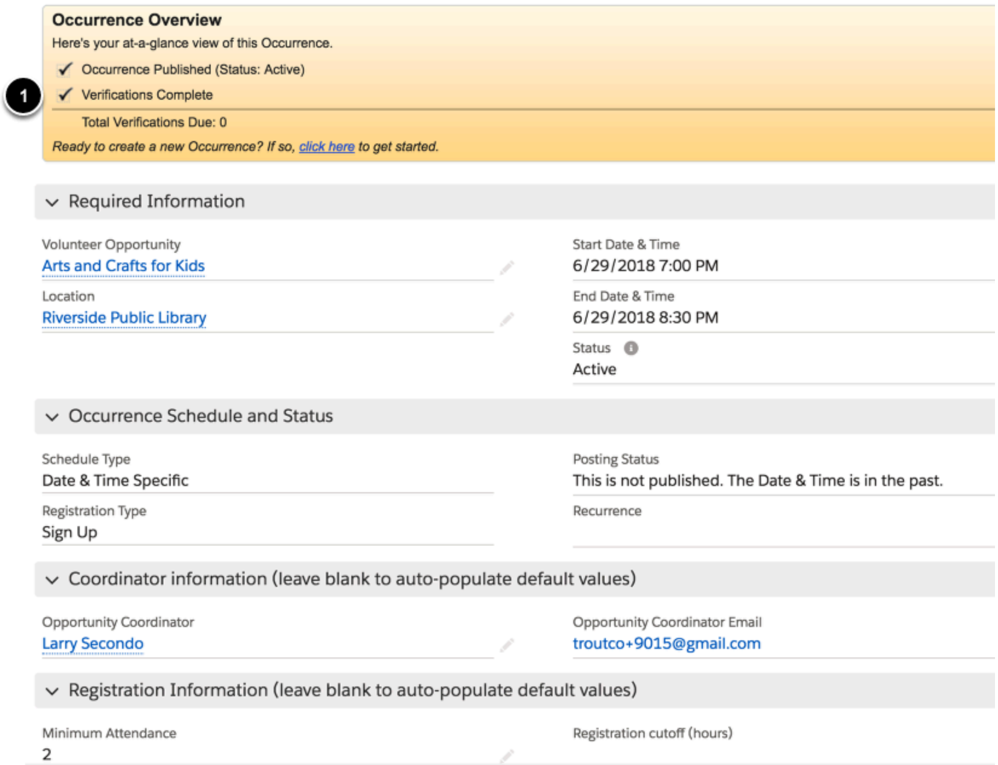
Occurrence Record Saved View

Date and Time Specific Volunteer Opportunities have a separate occurrence for each unique day and time that volunteers may sign up.

Individually Scheduled opportunities have only one occurrence. This occurrence serves as a 'time-sheet' and volunteers may be connected to it more than once. That way if they volunteer many times over the course of an ongoing opportunity, you can track each specific day and time they attended.

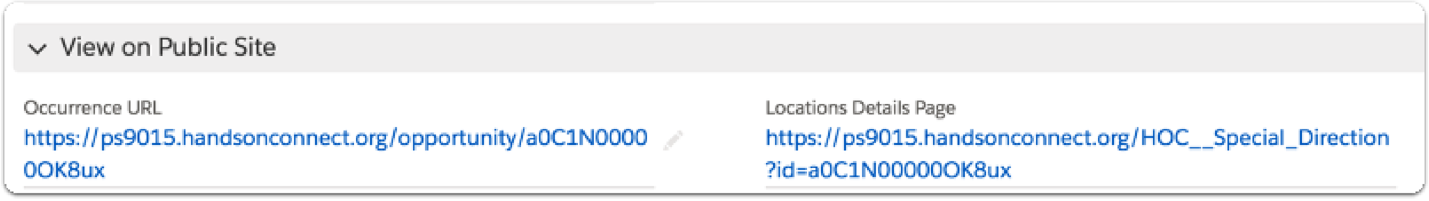
Remember that it is **Occurrences** that Volunteers sign up for or express interest in (and are therefore CONNECTED to) and not Volunteer Opportunities.

Here is a date and time specific occurrence record in its saved state



1. The Occurrence Overview shows you at a glance if the occurrence is active (only active occurrences are live on the public site) and whether verifications of volunteer attendance and hours for the occurrence are complete, and if not, how many are outstanding. You'll get your most useful data if your occurrences are always completely verified.

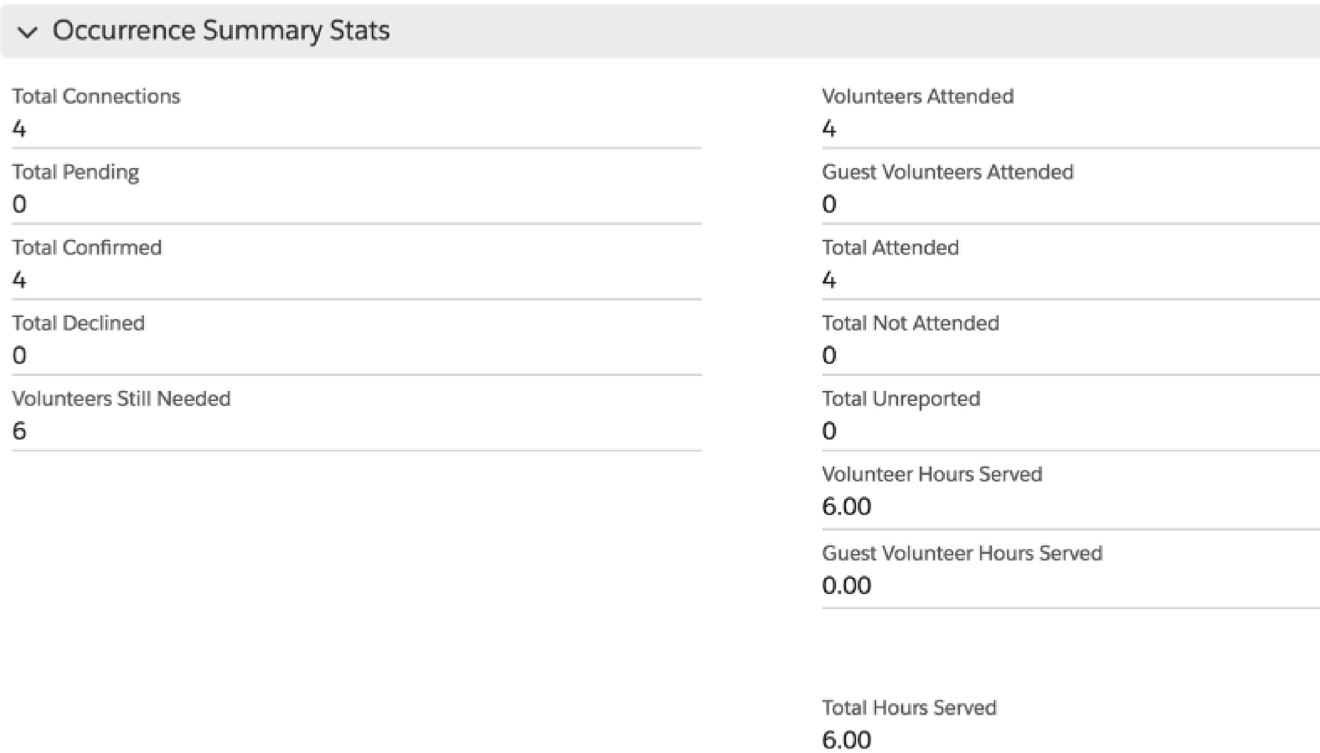
View on Public Site gives you links to the published occurrence and the locations detail page


View on Public Site

Occurrence URL
https://ps9015.handsonconnect.org/opportunity/a0C1N00000OK8ux

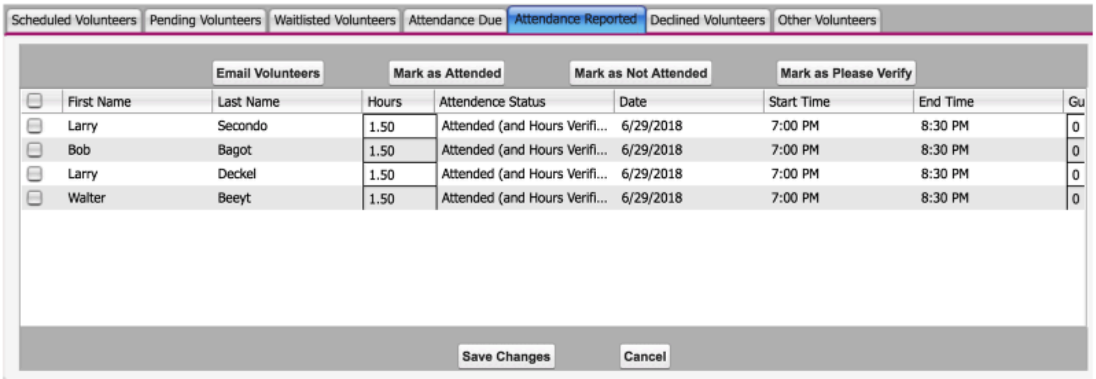
Locations Details Page
https://ps9015.handsonconnect.org/HOC__Special_Direction?id=a0C1N00000OK8ux

The Occurrence summary stats are automatically calculated for you and gives you at a glance statistics of this one occurrence.


Occurrence Summary Stats

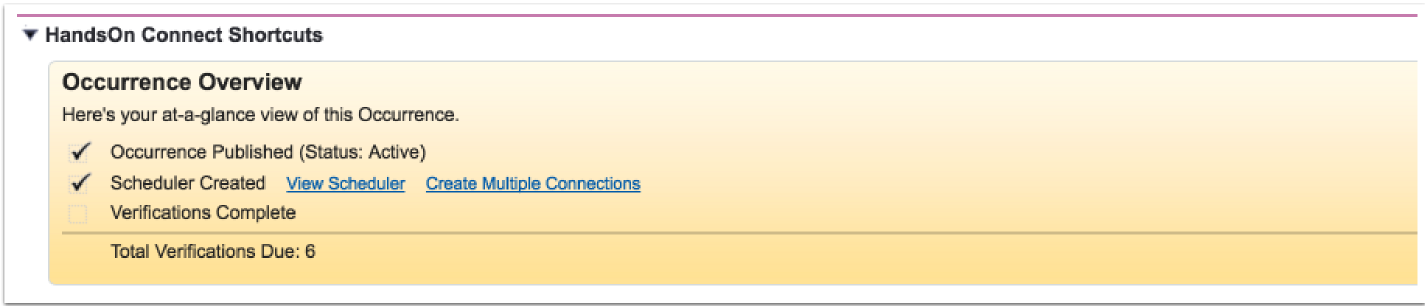
Total Connections: 4	Volunteers Attended: 4
Total Pending: 0	Guest Volunteers Attended: 0
Total Confirmed: 4	Total Attended: 4
Total Declined: 0	Total Not Attended: 0
Volunteers Still Needed: 6	Total Unreported: 0
	Volunteer Hours Served: 6.00
	Guest Volunteer Hours Served: 0.00
	Total Hours Served: 6.00

The Connections Grid



The Connections Grid is where you manage all the connections (sign-ups / express interests) that have been made to the occurrence. See managing connections for more information.

Individually Scheduled Opportunities have a slightly different overview section with additional options



Individually Scheduled Opportunities have options to update the opportunity schedule and a link to administratively create multiple connections.

View Scheduler - allows you to modify the schedule you created when creating the ISO opportunity

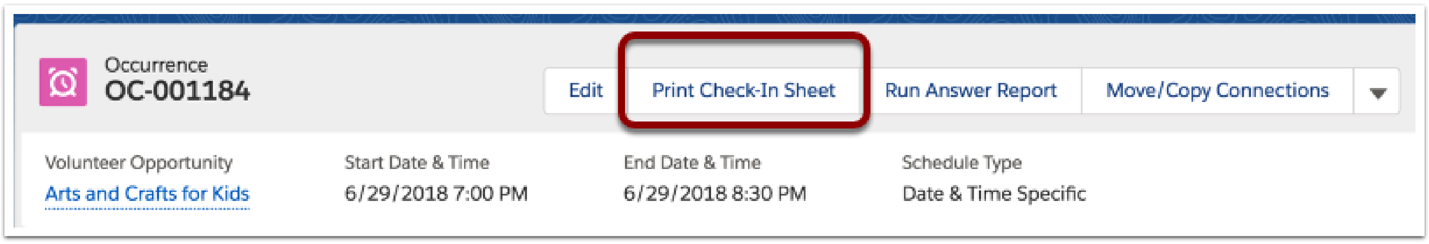
Create Multiple Connections - allows you to administratively add one or a recurring series of connections for a volunteer to this occurrence of an ISO. See this article for details.

Printing Check-in Sheets

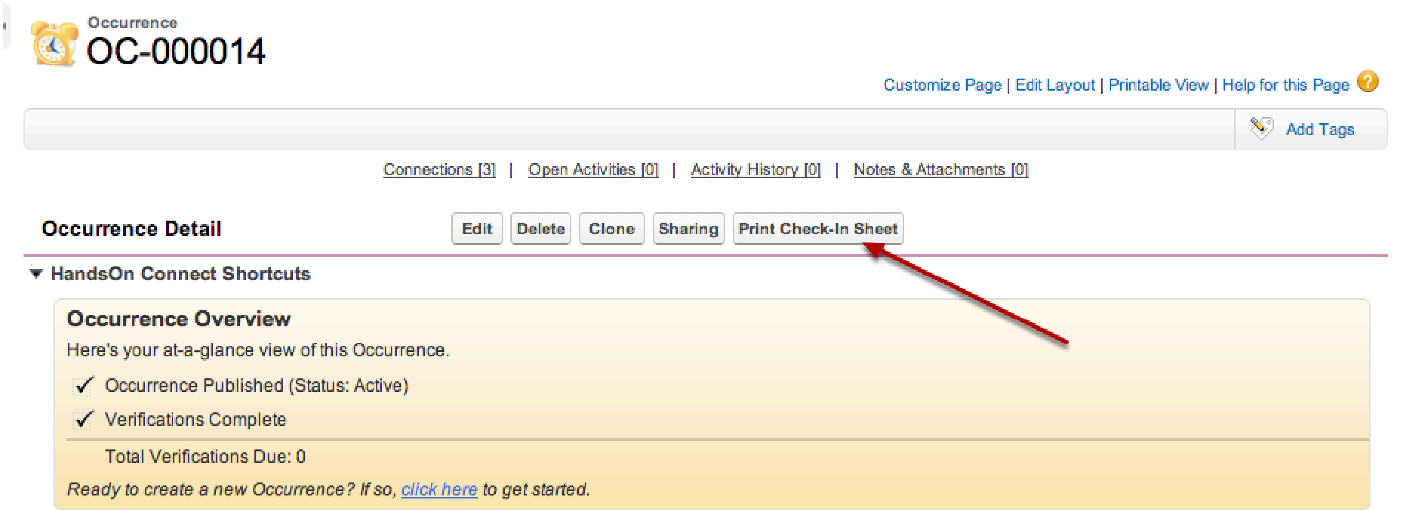
When its time to lead a volunteer opportunity, you can print a check-in sheet of all the volunteers who are confirmed for the occurrence from the occurrence record page

At the top of each occurrence page is a "Print Check-In Sheet" button

In Lightning it is a quick action button:



In SF Classic it is a button:



Clicking on this button will open a printable, .pdf file that lists all the confirmed volunteers for the opportunity that you can use as a check-in sheet.

Check-In Sheet:

Arts & Crafts with Kids

Organization: Troutco

HandsOn CONNECT DEMO

July 16, 2010 07:00PM - 08:30PM

Volunteer Opportunity Session Location:

3649 Mission Inn Ave Riverside CA 92506

Name	Team Name	Phone	E-Mail	Address	Over 18?	Signature
Art Trout		(323) 123-1234	troutco+training_partner@gmail.com	123 Test Street Riverside CA 92506	Yes	
Lenny Leader		234-123-1234	troutco+training_leader@gmail.com	1234 Leader Lane Riverside CA 92506	Yes	
Valerie Volunteer		951-123-1234	troutco+training_volunteer@gmail.com	6321 Volunteer Street Riverside CA 92501	Yes	

The check in sheet lists all the confirmed volunteers and contact information for easy reference. It is most useful for date and time specific opportunities as it will list the volunteers coming for that specific date and time. You can use this to have volunteers sign in and then use it as a reference when reporting attendance.

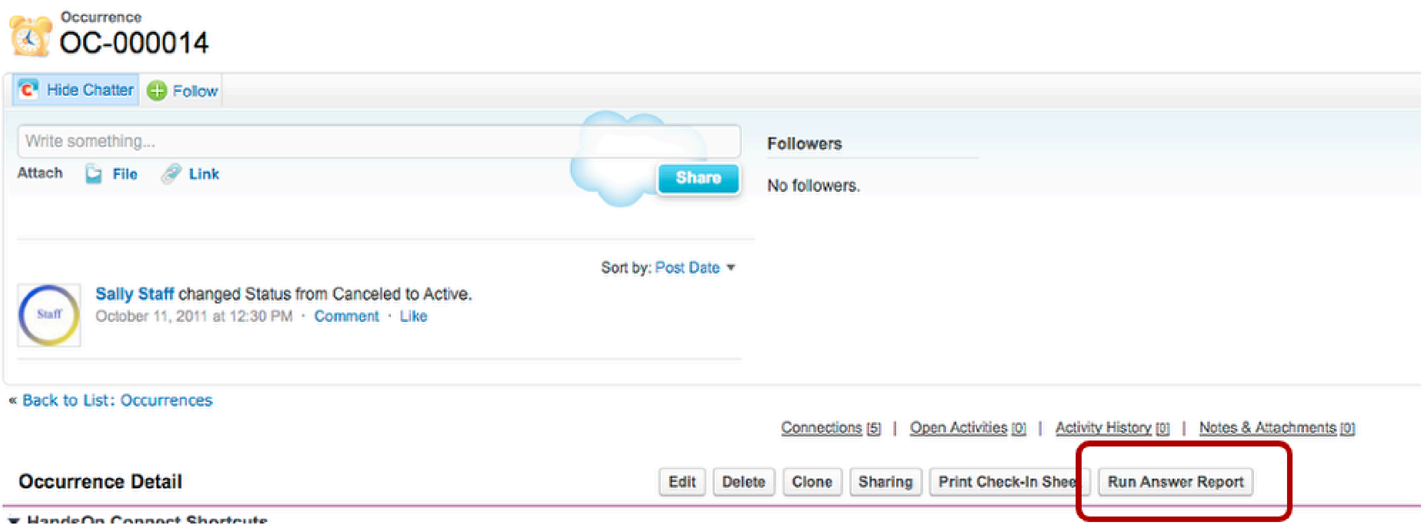
The Answers Report

A Volunteer Opportunity that has custom questions associated with it prompts the volunteers to "answer" those questions when they sign up for an occurrence.

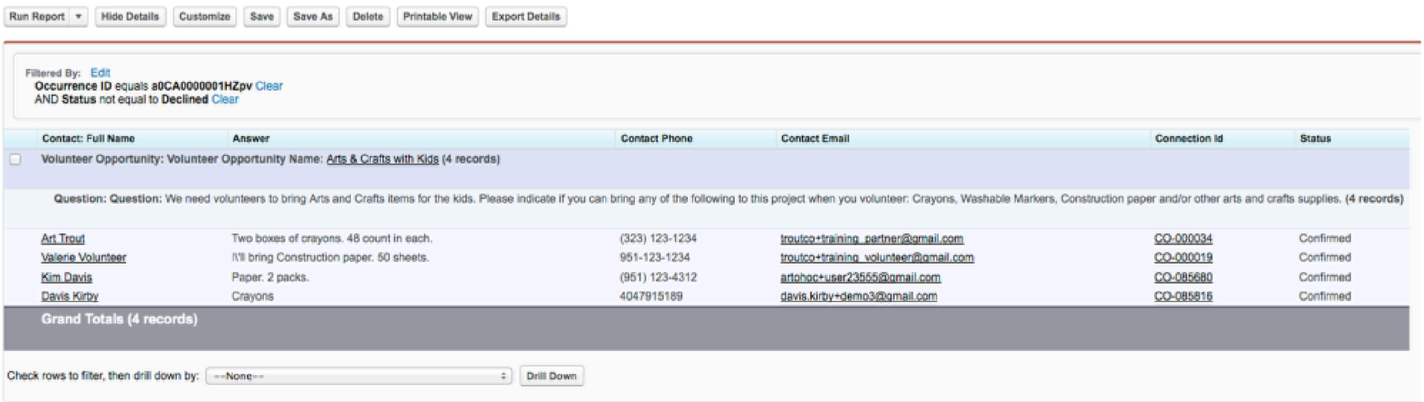
You can easily see the answers the volunteers gave to questions by clicking on the "Run Answers Report" button in the Occurrence Record.

The answers report gives the answer for HOC Questions associated with that volunteer opportunity and occurrence. While the functionality to create custom questions still exists in HOC -- the optional Advanced Registration System add-on provides a more robust way of asking additional questions during signup for an occurrence. This report is needed only for non-ARS users who are using the native HOC question functionality.

Run the report by clicking either the quick-action button (Lightning), or the standard button in Classic.



This pops up a report window with the answers to each question from each volunteer:



This makes it easy for the Opportunity Coordinator to get information from the volunteer regarding any questions posed for this occurrence of this opportunity.

Occurrence Record Advanced Email Options

In some instances of HandsOn Connect your system administrator may have enabled advanced functionality giving you the ability to suppress automated emails normally sent to volunteers and Opportunity Coordinators. If this has been enabled in your instance of HandsOn Connect you'll see an additional section in the occurrence page layout.

System admins: Click here for instructions on enabling Advanced Email options in your instance of HandsOn Connect.

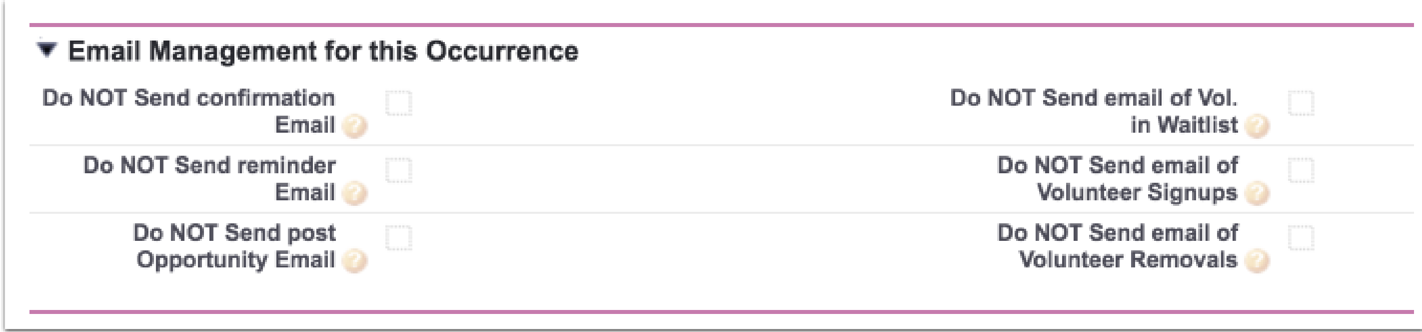
Advanced Email Management fields:

A section of the page layout for occurrences will be labeled "Email management for this Occurrence"

In it are six checkboxes that by default will be unchecked.   When unchecked, the normal automated system emails are sent for this occurrence.

Here's what happens if you check any of these boxes as true:

- Do NOT Send confirmation email -- Volunteers will not receive an automated email when they sign up or express interest in this occurrence.
- Do NOT Send reminder Email -- Volunteers will not receive an email reminding them they are signed up (normally sent 4 days before the occurrence date)
- Do NOT Send post Opportunity Email - Volunteers will not receive an email the day after the Occurrence.
- Do NOT Send email of Vol. in Waitlist - Opportunity Coordinator will not receive an email each time a volunteer is added to the waitlist fo this occurrence.
- Do NOT Send email of Volunteer Signups - Opportunity Coordinator will not receive an email each time a volunteer signs up for the occurrence. (Note: Express Interest emails will still be sent, as its critical that the Opportunity Coordinator is alerted that they have to confirm a volunteer who has expressed interest.)
- Do NOT Send email of Volunteer Removals - Opportunity Coordinator will not receive an email each time a volunteer is removed from this occurrence.



Reference: Here are the email templates you'll be suppressing for date and time specific opportunities using these fields:

Do Not Send Confirmation Email:

- Opportunity Sign up Confirmation - Affiliate Managed (full sign up)
- Opportunity Sign-up Confirmation - Partner calendar full sign up
- Opportunity Sign up Confirmation - Affiliate Managed - Date and Time Specific - EI
- Opportunity Sign up Confirmation - Partner Calendar email only (express interest)

Do not send Reminder Email

- Opportunity Reminder - Affiliate Managed
- Opportunity Reminder - Partner Managed

Do not send Post Opportunity Email

- Post Opportunity - Affiliate Managed
- Post Opportunity - Partner Managed

Do not send email of Vol. in Waitlist

- Notification of Volunteer in Wait List

Do not send email of Volunteer Signups

- Notification of Volunteer Signups

Do not send email of Volunteer Removals

- Notification of Volunteer Removals

Things to consider:

If these emails are suppressed globally (either by disabling workflows or via the trigger based emails that can be disabled via the control panel) - the global settings will prevail. (i.e. These boxes may appear unchecked at the occurrence level, but this doesn't always mean the emails will be sent)

If you choose to suppress any of these emails - you may want to substitute a custom email with your own text. These can either be manually sent or you can suppress the standard email delivery here, and create a [custom workflow] to send a specialized email template for this occurrence.

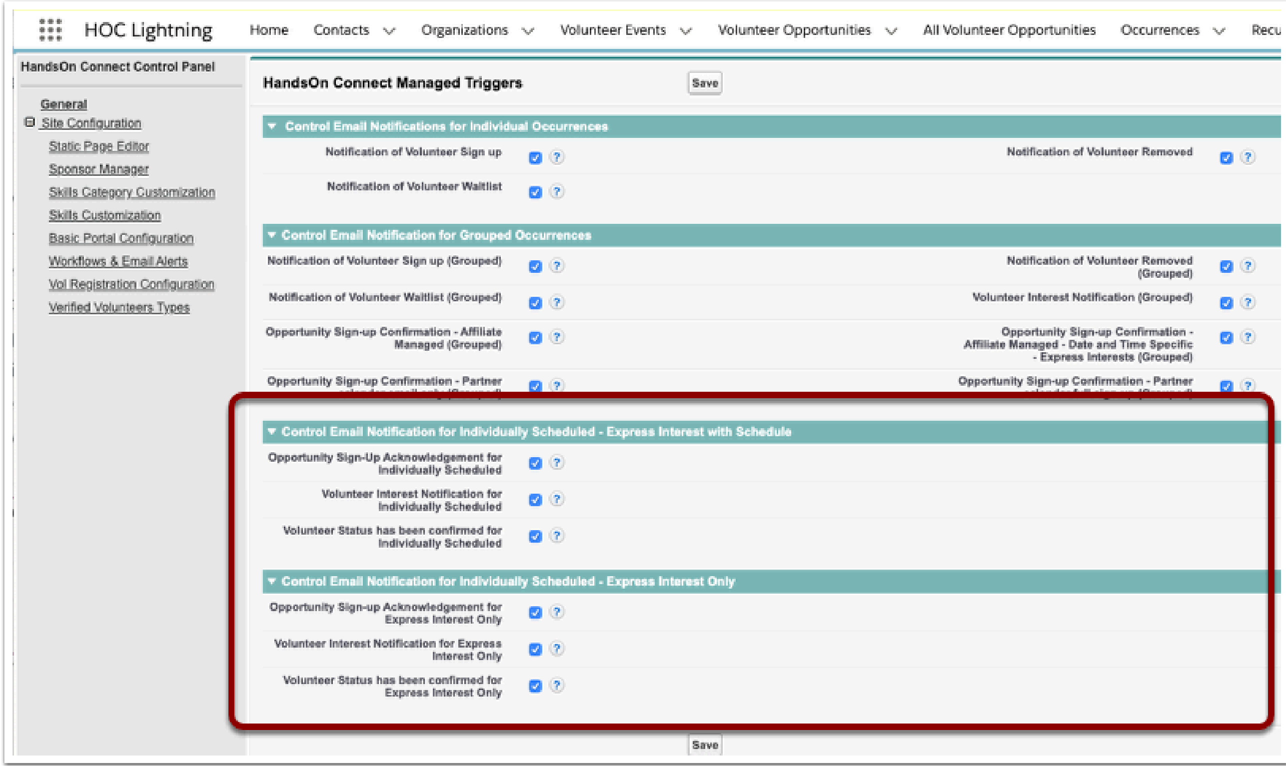
Note: These email management features are primarily for use in conjunction with Date and Time Specific Opportunities. Only the checkbox 'Do NOT send post opportunity email' will have an effect on Individually Scheduled Opportunities.

For Individually Scheduled Opportunities the post opportunity email IS sent, and it CAN be supressed by checking the 'do not send post opportunity email" checkbox.

The following Emails related to Individually Scheduled Opportunities can be disabled **system-wide** for ALL occurrences. This is done by accessing the **Control Panel / Workflows & Email Alerts:**

- Opportunity Sign-Up Acknowledgement. (the email sent when someone expresses interest)
- Volunteer Status has been confirmed (the email sent when a pending ISO connection is confirmed)
- Volunteer Interest Notification for Express Interest Only (The email sent to the Opportunity Coordinator when a volunteer expressess interest)

For **Individually Scheduled Opportunities**, no automated reminder email is sent.


HOC Lightning
Home
Contacts
Organizations
Volunteer Events
Volunteer Opportunities
All Volunteer Opportunities
Occurrences
HandsOn Connect Control Panel
General
Site Configuration
Static Page Editor
Sponsor Manager
Skills Category Customization
Skills Customization
Basic Portal Configuration
Workflows & Email Alerts
Vol Registration Configuration
Verified Volunteers Types
HandsOn Connect Managed Triggers
Save
Control Email Notifications for Individual Occurrences
Notification of Volunteer Sign up
Notification of Volunteer Removed
Notification of Volunteer Waitlist
Control Email Notification for Grouped Occurrences
Notification of Volunteer Sign up (Grouped)
Notification of Volunteer Removed (Grouped)
Notification of Volunteer Waitlist (Grouped)
Volunteer Interest Notification (Grouped)
Opportunity Sign-up Confirmation - Affiliate Managed (Grouped)
Opportunity Sign-up Confirmation - Affiliate Managed - Date and Time Specific - Express Interests (Grouped)
Opportunity Sign-up Confirmation - Partner
Opportunity Sign-up Confirmation - Partner
Control Email Notification for Individually Scheduled - Express Interest with Schedule
Opportunity Sign-Up Acknowledgement for Individually Scheduled
Volunteer Interest Notification for Individually Scheduled
Volunteer Status has been confirmed for Individually Scheduled
Control Email Notification for Individually Scheduled - Express Interest Only
Opportunity Sign-up Acknowledgement for Express Interest Only
Volunteer Interest Notification for Express Interest Only
Volunteer Status has been confirmed for Express Interest Only
Save

Best Practice: Do not add too many occurrences to a single Volunteer Opportunity

If you have a long-running volunteer opportunity, that will have a LOT of occurrences over the course of multiple years, it's best to NOT create too many occurrences for a single volunteer opportunity.

What's 'too many occurrences"

We recommend that the maximum number of volunteers for a single volunteer opportunity never exceed 10,000.

So you can calculate what constitutes 'too many occurrences' like this:

Maximum Number of Volunteers X Number of Occurrences < 10,000

If you get over 10,000 connections (or anything approaching that), you'll eventually run into a Salesforce limit error, and be unable to edit the connections, report attendance, etc. See this technical note on why this occurs.

Create a new Volunteer Opportunity each year for long-running opportunities

If you have a long-running volunteer opportunity with a lot of occurrences which will then result in a lot of connections, you'll eventually hit the Salesforce limit and run into this error. Any volunteer opportunity that starts to approach about 10,000 connections is soon going to hit the Salesforce limit.

SO, instead of continuing to add occurrences to a long-running volunteer opportunity - **we recommend that you create a NEW opportunity record**, with the same name each year (or more frequently if necessary) - to avoid having more than 10,000 connections for any single volunteer opportunity.

Example: Let's say you've got an opportunity called "New Volunteer Orientation" - and you've been adding occurrences to it for several years now -- you're eventually going to hit the limit.

So -- instead of adding additional occurrences, **create a NEW volunteer opportunity called "New Volunteer Orientation"** or, better yet "New Volunteer Orientation 2015" (so you can search and find the current version of the opportunity easily) and make this year's occurrences associated with it (rather than the old opportunity). That way you'll not run into the limit. Your old version of the opportunity will cease to show up on the website after its last scheduled occurrence has passed.

(Advanced Feature) How to add names and descriptions to individual occurrences

Before you can start adding names and descriptions to individual occurrences, your system administrator will need to install the functionality. See this article for instructions on how to install this advanced functionality.

This article will then describe how to use the new functionality when you need it!

What are occurrence and descriptions used for?

Sometimes you may have a volunteer opportunity that needs volunteers broken into separate shifts and/or positions. Rather than creating a Volunteer Event, and separate Volunteer Opportunities (each with one or more occurrences), you could create a single volunteer opportunity, and for each 'shift' or 'position' volunteers are needed for, you can create a separate occurrence record and give each occurrence an "Occurrence Name" (Such as "Shift 1" "Registration" or "Cleanup Crew". You can also optionally add a short description of this shift or position that will appear as part of the occurrence information

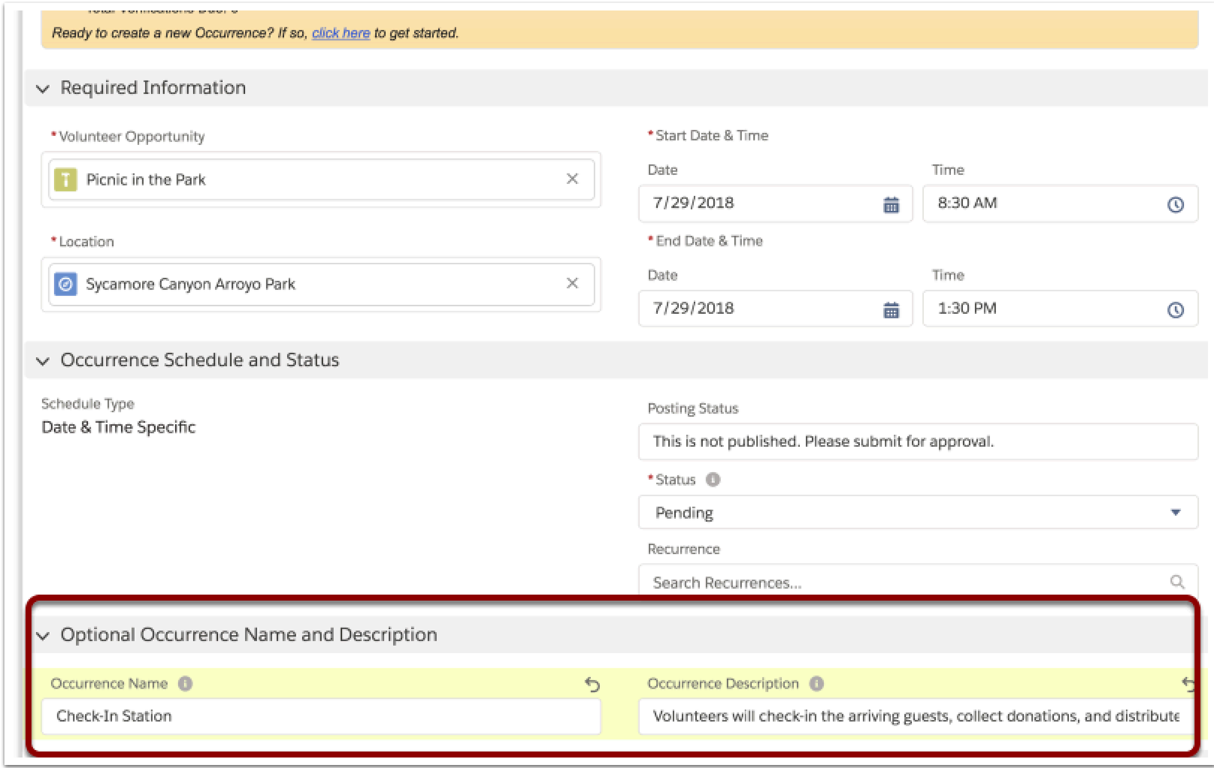
As an example, we have created a volunteer opportunity called Picnic in the Park, and put a general description of the picnic in the volunteer opportunity description.

We need volunteers for three different jobs at the picnic:

- Check-In station. from 8:30 - 1:30
- Lunch Distribution from 10:30 - 2:30 pm
- Valet Parking from 11 am - 1 pm

So we'll create three occurrences for those three times the same day, and use the Occurrence Name field to identify the 'role' and the Occurrence Description to give volunteers a better idea of what they'll do in that role.

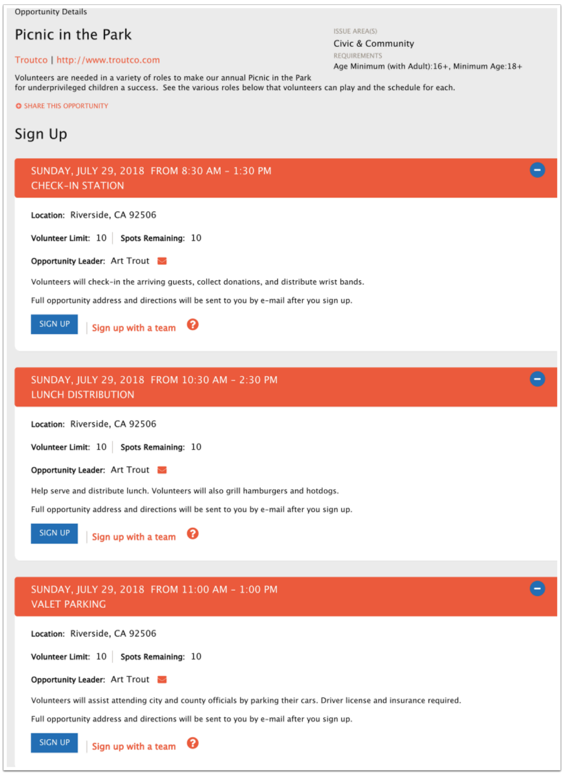
In each Occurrence Record - add an occurrence name and description



Remember. The use of occurrence names and descriptions is strictly optional, and should only be used when it makes sense to give volunteers more detail about a volunteer opportunity. If you leave these fields blank, occurrences will just have the usual start date/time end date/time and coordinator info.

How will this look on the public site.

When used... Occurrence titles show up along with the date and time, and the Occurrence Description (if used) shows up in the Occurrence detail.

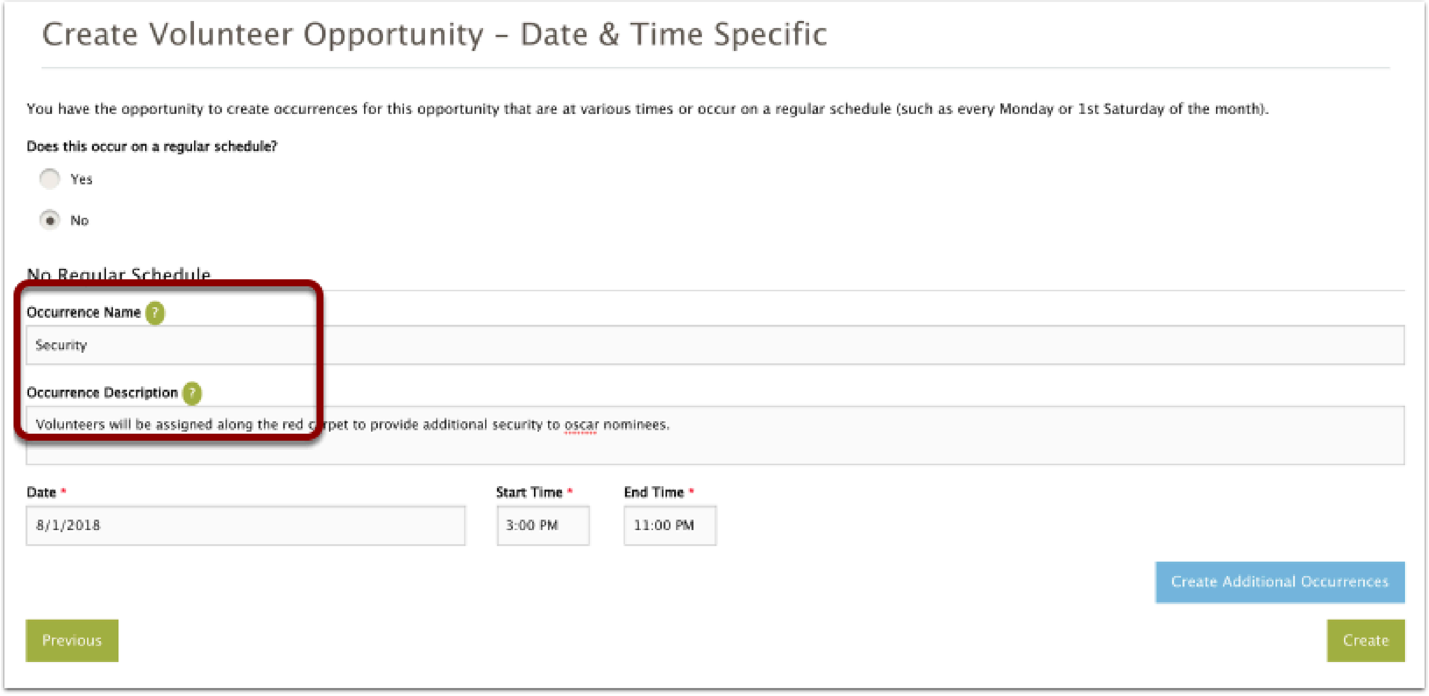


How to add Occurrence Names and Descriptions in the Partner Portal

When this feature is enabled. Partners are able to add Occurrence Names and Descriptions when they create new volunteer opportunities.

Because each occurrence can get its own unique name and description, the option to add these is only available when you add occurrences one at a time. (i.e. 'no regular schedule").   If you select 'regular schedule' you won't be able to give a neme and description to all the occurrences you are creating at one time.

When creating the volunteer opportunity, the partner will see these two new fields when creating a date and time specific opportunity with no regular schedule:



When this feature is enabled in your organization -- be sure to inform your partners about these two new fields, and the fact that they are strictly optional. Make sure they understand the use case for them so they do not begin populating them in a way that is confusing to volunteers.

(You can place an announcement about it on the partner home page for example :-)

If you do not wish this feature to be available to your partners in the sharing portal, please open a request in the help center and we can disable it for partners, making it only available for you to use on the Salesforce back end. By default, it WILL be enabled for your partners.

A partner can add occurrence names and descriptions AFTER they create the opportunity if desired by clicking on "Edit" for each individual occurrence.

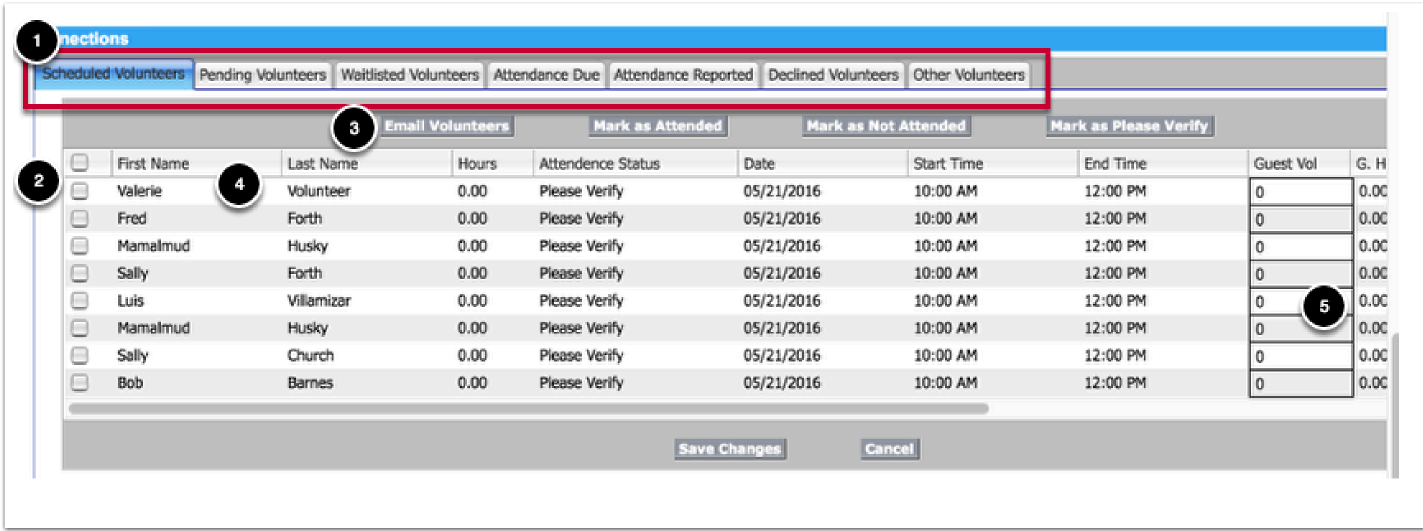
Managing Connections for an occurrence using the connections grid

Managing Volunteers with the Connections Grid in the Occurrence Record.

The most powerful component in the Occurrence Record is the Connections Grid. it allows you to view all the connections made to this occurrence, and to take actions on more than one connection at a time.

Most of the work you'll do managing an occurrence will take place in the connections grid. This is where you can see who has signed up or expressed interest, who is waitlisted, mark attendance (after the occurrence has taken place), and record hours.

Connections Grid in the Occurrence Record



1. The Connections grid shows you all the volunteers (connections) who have signed up or expressed interest in your opportunity. The connections are organized into seven tabs:

- Scheduled Volunteers - shows all confirmed volunteers for connections that have not yet taken place.
- Pending Volunteers - shows all connections in pending status   (used for express interest opportunities, where this tab will be selected by default for your convenience!)
- Waitlisted Volunteers - show all connections on the waitlist. (Note: This tab does not appear for To Be Scheduled or Individually Scheduled as they don't have waitlists)
- Attendance Due - shows all confirmed connections in the past, where attendance status is "please verify"
- Attendance Reported - shows all confirmed connections where the attendance has been reported (this is essentially, the volunteer history for this occurrence)
- Declined Volunteers -- shows all connections with status "Declined"

- Other Volunteers - shows connections that are missing date and times, a place where you can correct the data errors.

2. Checkboxes allow you to select one or more volunteers you wish to 'take action' on, by using one of the Actions Buttons (i.e. "Email Volunteers, Mark as Attended..."

3. Action Buttons   (updates or initiates an action for the checkmarked connections)

4. Column headings allow you to sort connections based on any of the column headings.

5. Any cell with a black border around it can be edited. (In this view, "Guest Volunteers" can be edited. So can Hours (though this field isn't editable until after you've reported and verified attendance). Any changes to individual cells (black boxes), will give those cells a red border. To save the changes in individual cells, click on the SAVE CHANGES button.

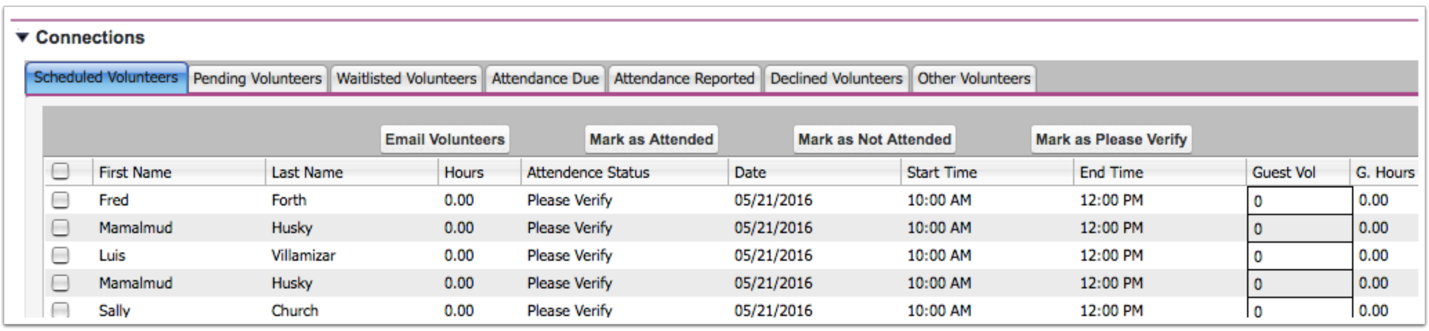
NOTE: There are additional columns available in the grid. To see them, horizontally scroll or use the right arrow key to go to the right.   (Macintosh users may not readily see the horizontal scroll controls due to the way scroll bars are handling in OSX.   (Columns not shown in the above screenshot include:

- Guest Hours
- Decline Reason
- Role
- Team Name
- Rating
- Created Date

Scheduled Volunteers

This tab shows you the volunteers who you have confirmed and scheduled for upcoming dates. You can sort on the date and see at a glance who is scheduled to volunteer with you in the coming days and weeks, and at what time.

If necessary, you can edit the date, start time and end time of existing connections from this tab if desired. (You should notify a volunteer if you reschedule them for a previously confirmed connection at a later date.)



Pending Volunteers

This tab shows you all the connections that volunteers have expressed interest in via the public site. They are still in pending status.

For date & time specific, express interest opportunities, the connections will all show the date and time of that occurrence.

For Individually Scheduled opportunities, each connection proposed by a volunteer will show up in the pending tab until you confirm it. You can

The date and times are already filled in for you and match the schedule you proposed so all you need to do to confirm a connection is put a check-box next to it, and click on the "Mark as Confirmed" button.

This is the tab you'll want to go to if you receive an email that a volunteer has expressed interest in one or more dates for an individually scheduled opportunity.

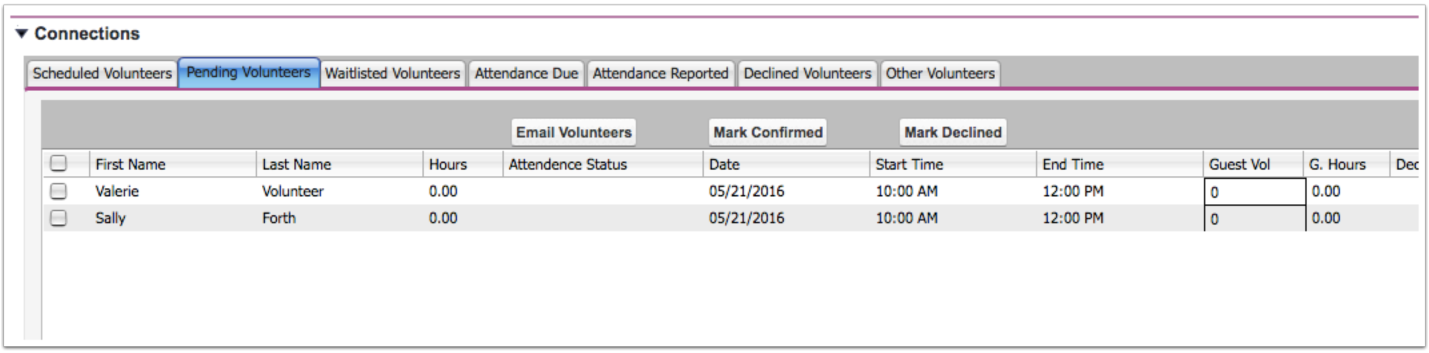
When you confirm multiple connections for one volunteer all at the same time, only one email will be sent letting them know that one or more dates they've expressed interest in are now confirmed, and they can log into their account on the public site to see the days and time they are now confirmed and scheduled for.

The email template sent for this communication is called: "Volunteer Status has been confirmed for Individually Scheduled."

For any date you do not wish the volunteer to attend, you can put a check-box next to that connection, and click "Mark Declined".

If you wish to reschedule a connection, email a volunteer from the grid, and go to the connections related list to edit the connection before confirming it with the revised date and time. (Or you can confirm the connection here, and then edit the date and time for the connection when it appears in the Scheduled Volunteers Tab.

For To Be Scheduled Opportunities, there will be only one connection for a volunteer who has expressed interest, *Note though that when confirming a volunteer for a TBS opportunity, the opportunity coordinator will still have to go to the 'scheduled volunteer' tab and manually schedule the date, start time and end time for the volunteer. Unlike the new Individually Scheduled Opportunities - for TBS opportunities the date and time the volunteer wishes to volunteer is not known and must be manually filled in by the Opportunity Coordinator after they've contacted the volunteer via email or telephone to arrive on an agreed upon connection date. (This is why we encourage everyone to start using the new Individually Scheduled Opportunities as it makes confirming volunteers faster and easier!)*

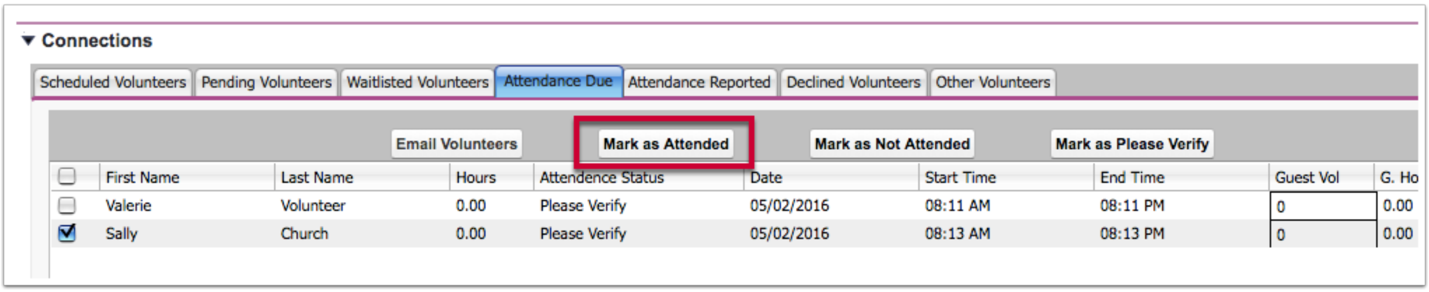


Attendance Due

The Attendance due tab shows you all confirmed volunteers, whose connection date is in the past, where attendance has not yet been reported. This tab makes it easy to find just the connections that are due to have attendance reported. (You can also report attendance across all occurrences of all opportunities with the new, One-Step Volunteer Attendance widget in the left sidebar).

Click on the connections you wish to mark attendance for, and select either "Mark as Attended" or "Mark as Not Attended"

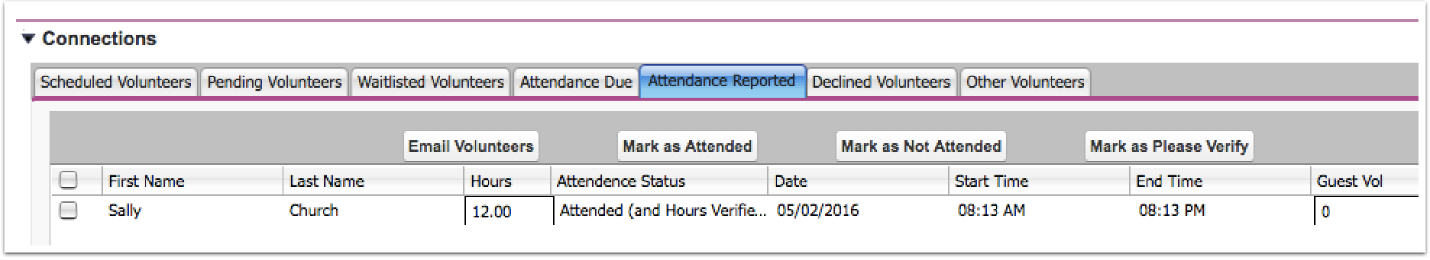
Once attendance for a connection has been marked, the connection will be moved to the Attendance Reported Tab.



Attendance Reported

In this tab you'll see all the connections that have been reported as either attended or not attended. If you wish to alter the number of hours that are auto-populated when you mark someone as attended, you can edit the hours in this tab. (By default, the hours will automatically be filled in based on the duration of the scheduled connection. You can edit the date, start time, end time, # of hours, guest volunteers and any other detail of a connection in this tab.

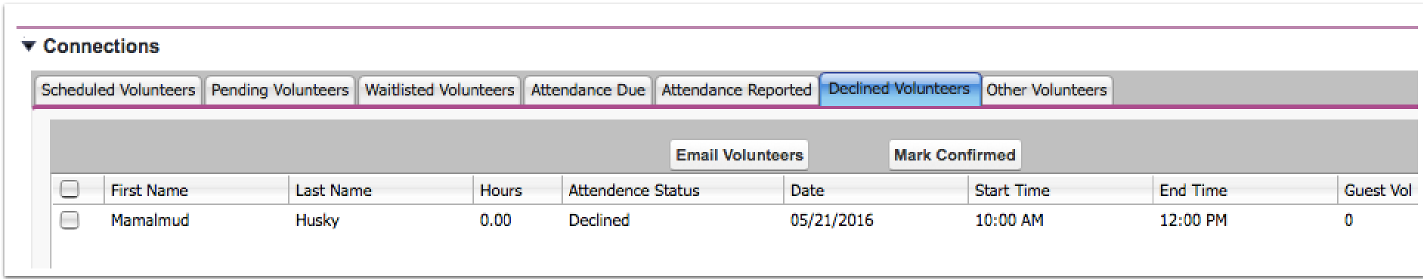
This tab groups the past history of all attendance verified connections for this opportunity



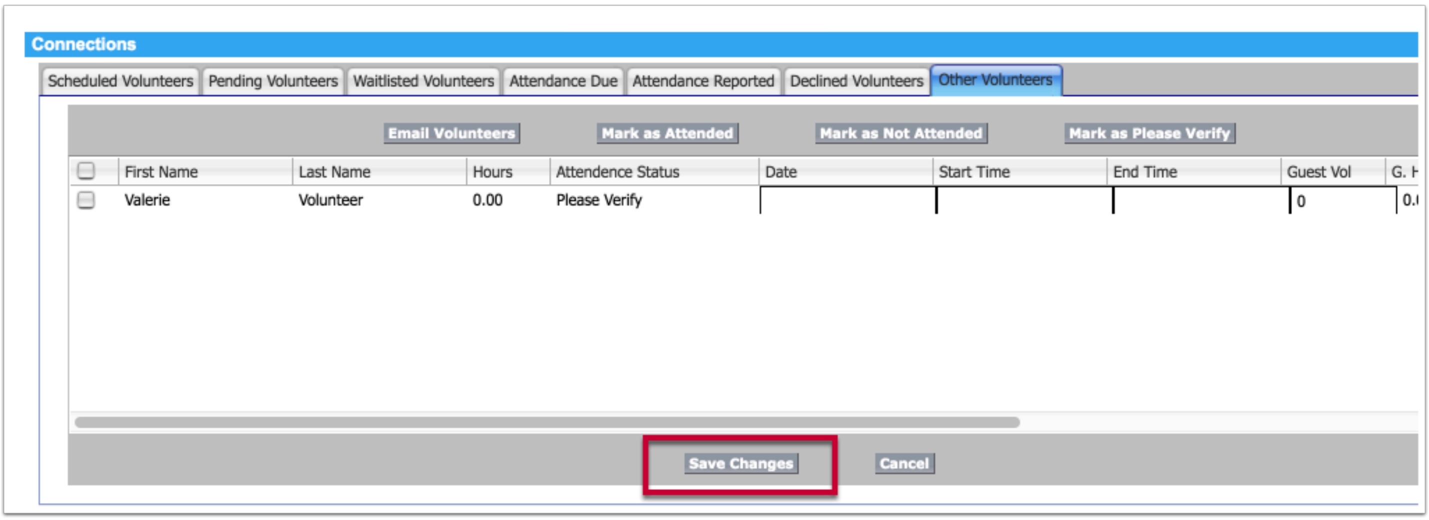
Declined Volunteers

This tab will show you all connections that have been declined, either by you administratively, or by a volunteer removing themselves from a scheduled date / time for this opportunity.

The 'mark confirmed' button makes it possible for you to return someone to either the Scheduled Volunteers tab or the Attendance due tab in case you've accidentally declined them.



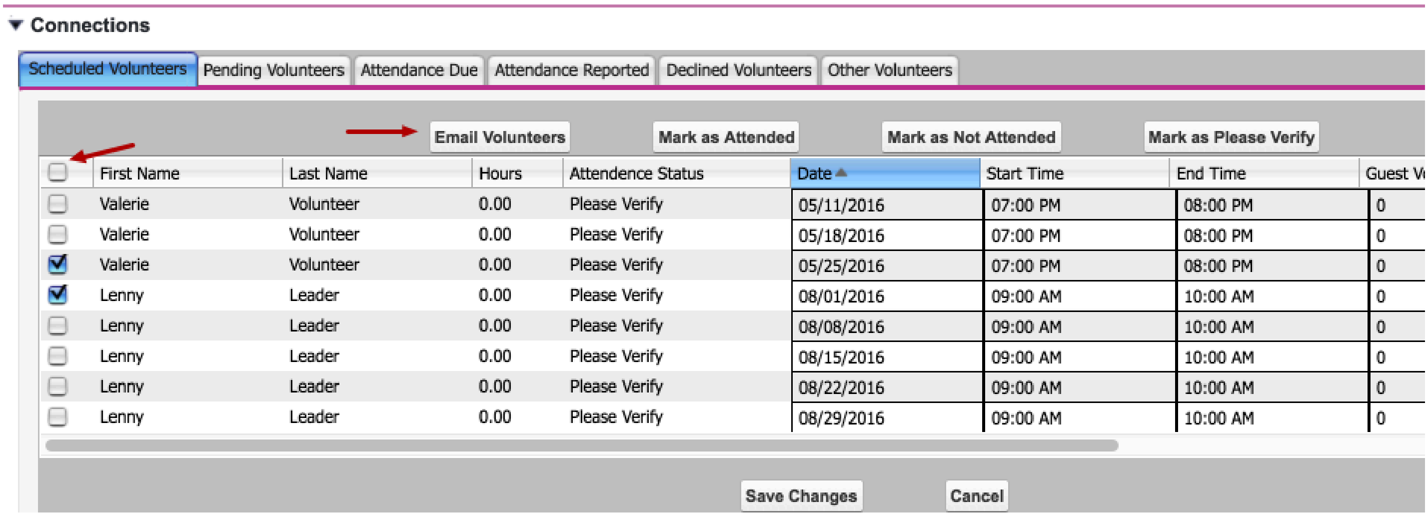
Other Volunteers



Sometimes, for one reason or another, you accidentally delete the date and/or start time and end time for a connection. This is bad data practice, but luckily it can be corrected. Connections appearing in the "other Volunteers" tab are missing date info. Just fill in the date info and click "Saved" to update the connection, and it will then be moved to the correct tab (either Scheduled volunteers or Attendance Due".

Using the Connection grid to send emails to volunteers

It's easy to email volunteers individually, or as a group, directly from the occurrence grid.



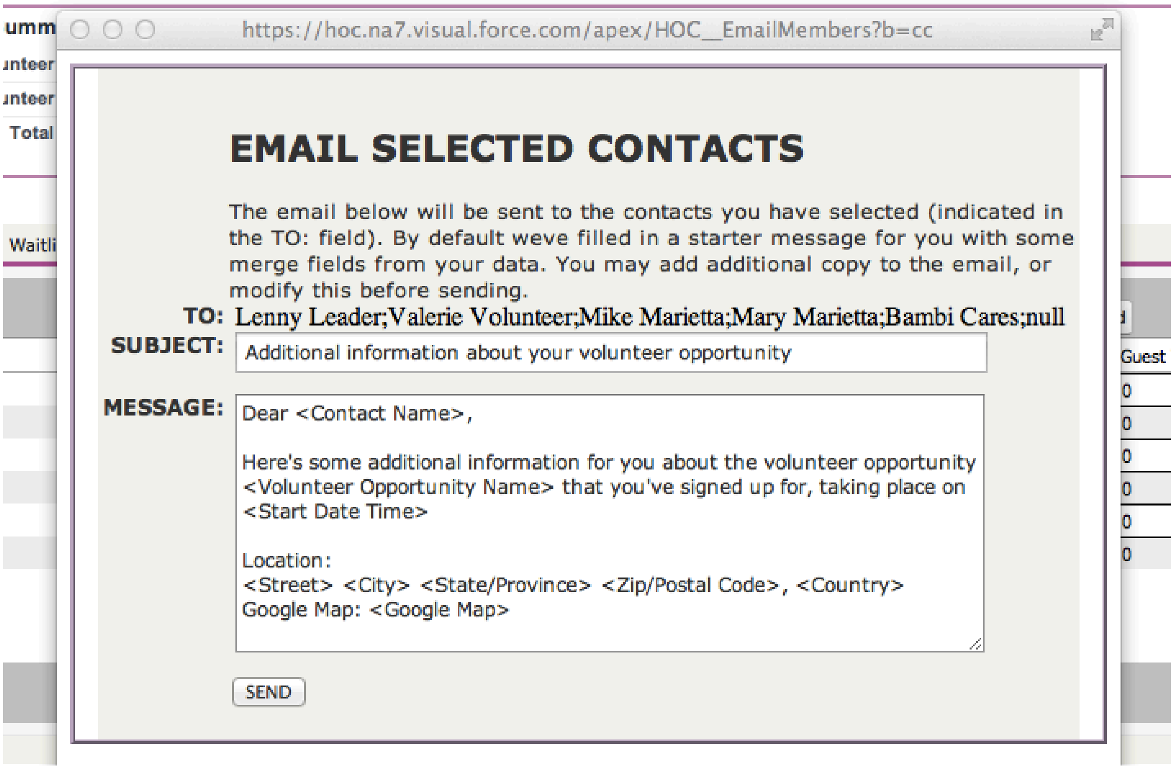
	First Name	Last Name	Hours	Attendence Status	Date	Start Time	End Time	Guest V
☐	Valerie	Volunteer	0.00	Please Verify	05/11/2016	07:00 PM	08:00 PM	0
☐	Valerie	Volunteer	0.00	Please Verify	05/18/2016	07:00 PM	08:00 PM	0
☑	Valerie	Volunteer	0.00	Please Verify	05/25/2016	07:00 PM	08:00 PM	0
☑	Lenny	Leader	0.00	Please Verify	08/01/2016	09:00 AM	10:00 AM	0
☐	Lenny	Leader	0.00	Please Verify	08/08/2016	09:00 AM	10:00 AM	0
☐	Lenny	Leader	0.00	Please Verify	08/15/2016	09:00 AM	10:00 AM	0
☐	Lenny	Leader	0.00	Please Verify	08/22/2016	09:00 AM	10:00 AM	0
☐	Lenny	Leader	0.00	Please Verify	08/29/2016	09:00 AM	10:00 AM	0

Any actions you take in the connection grid start by adding a check-box in the row for the connection or connections you wish to take action upon.

Note: *If you put a checkbox at the top of the column, it will automatically check ALL the connections in that tab of the grid. Very useful for date and time specific occurrences -- less useful for individually scheduled and to be scheduled where the same volunteer will be scheduled for different dates.*

We Then Click on the Email Volunteers button.

A popup window presents the default text of a reminder email for that occurrence, which will be addressed to each of the selected contacts.

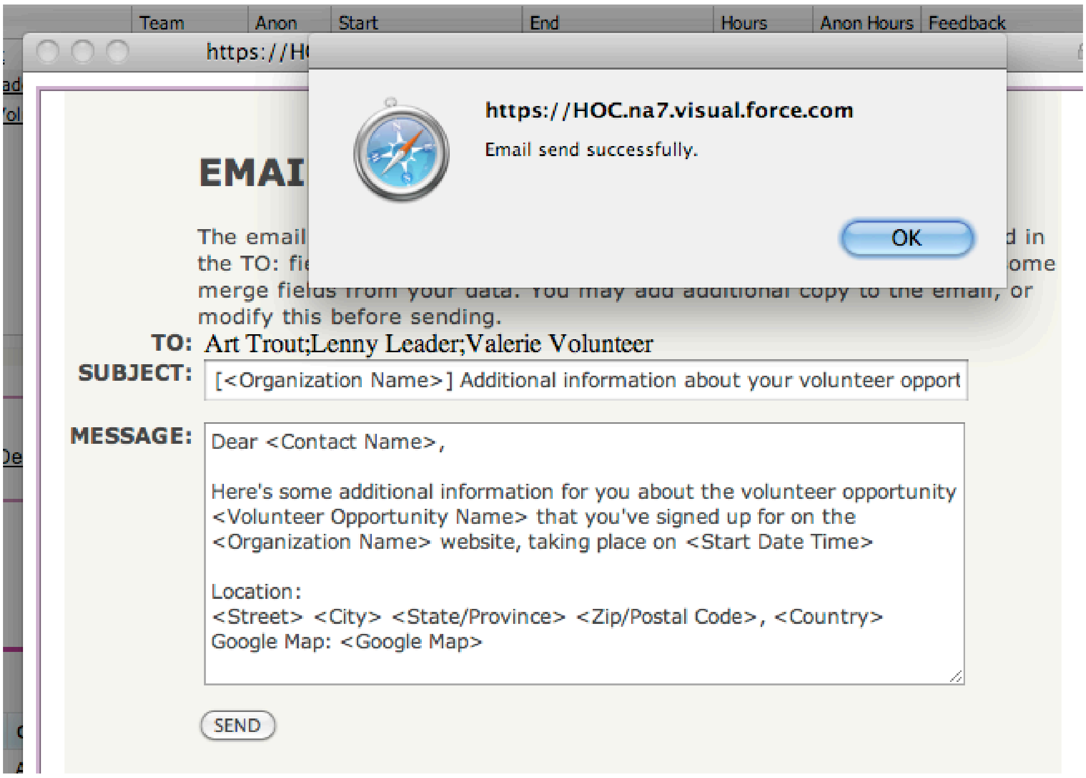


The email contains a number of merge fields to personalize the email with details of this occurrence.

You can edit the message as you wish, adding additional content and/or deleting the default information.

Click SEND to send the email to each of the volunteers.

Confirmation pop-up.



Note: Connections for volunteers who do not have email addresses (some team members, for example), will NOT be sent an email even if you select them.

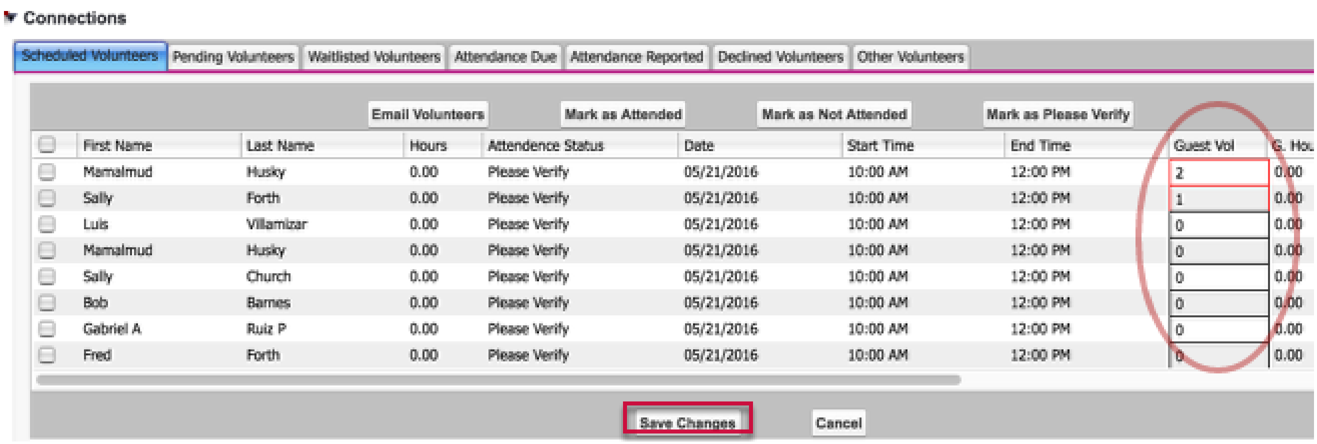
How to add 'guest' volunteers to an occurrence

Sometimes your registered volunteers will contact you notifying you that they'll be bringing guests, family, or friends with them to volunteer and they'd like you to reserve space for them.

Ideally, the volunteer would encourage their friends to sign up on the website and make a genuine connection. Alternately, they could create a team, and as team captain they could connect their volunteers themselves.

But sometimes they just call you and say, I'm bringing three friends. Sometimes they just show up with the friends at the project. You want to track the service hours of these anonymous volunteers, but don't want to create new contacts for these 'guests' -- so you can add them to the connection grid as Guest Volunteers.

How to add Guest Volunteers (Anonymous volunteers)



To do so, just put the number of guests in the Guest Volunteer column next to the person who is bringing them.

Do this by double-clicking on the 0 in the Guest Vol column, and then put in the number. The box will turn red to indicate the data has been edited.

Click SAVE CHANGES to record the changes to one or more connections. (If you do not save the changes for any values that were edited before leaving the page, the changes will be lost).

If you refresh the occurrence record (reload it by clicking on refresh on your browser), you'll see the summary info updated

Notice that in the summary here, there are only3 connections, but 6 volunteers are confirmed for this opportunity. That's counting the 3 'guests". You can administratively add connections and/or guests and bring an occurrence over its maximum number if you wish.

You can add Guest volunteers before the opportunity takes place (thereby using up some of its available slots), or add them After the Occurrence takes place.

"Express Interest" Connections - confirming or declining volunteers

For date and time specific - sign up opportunities -- a volunteer is automatically confirmed when they sign up.

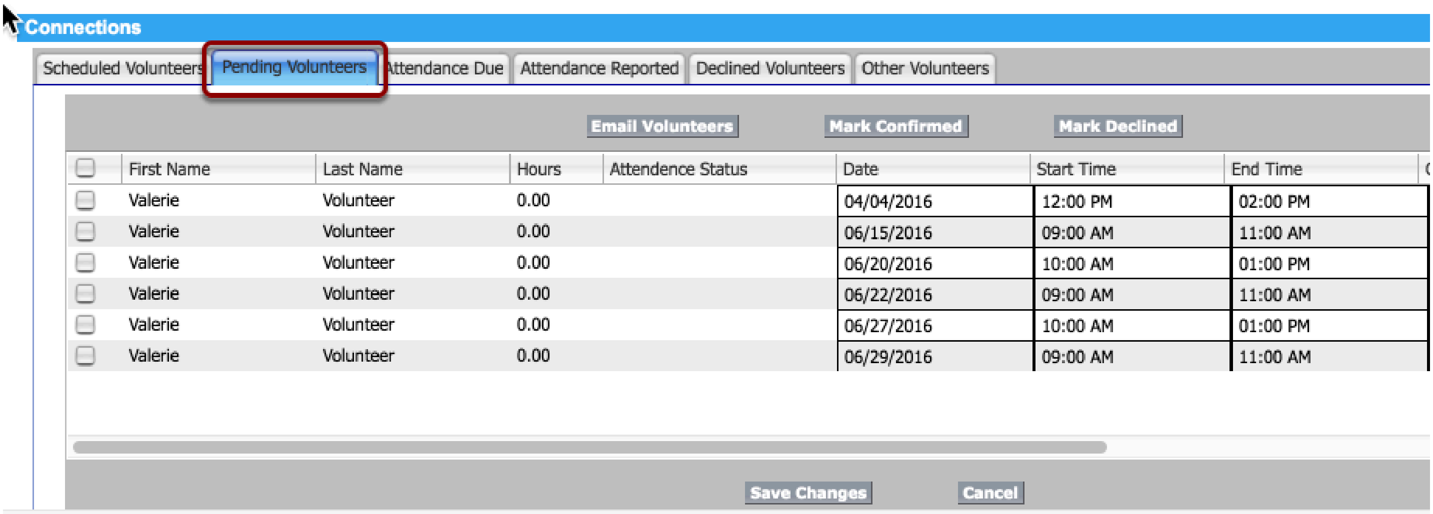
For date and time specific, express interest opportunities, and Individually Scheduled - Express Interest with Schedule Opportunities - the Opportunity Coordinator will receive an email letting them know that a volunteer has expressed interest in the opportunity, and that they need to confirm the volunteer's connection. The link in the email will take you directly to the connection record. (Be sure to log in first before clicking on the link!)

The managing organization can view the pending connection in the pending volunteers tab of the connections grid in that record, and email the volunteer directly if they want them to do more before confirming them. (Example: You might ask them to submit to a background check).

For Individually Scheduled opportunities that are 'express interest only' -- there is no need to need to confirm volunteers. The intent of this opportunity type is just to gather a list of those who are interested.

Confirming Volunteers

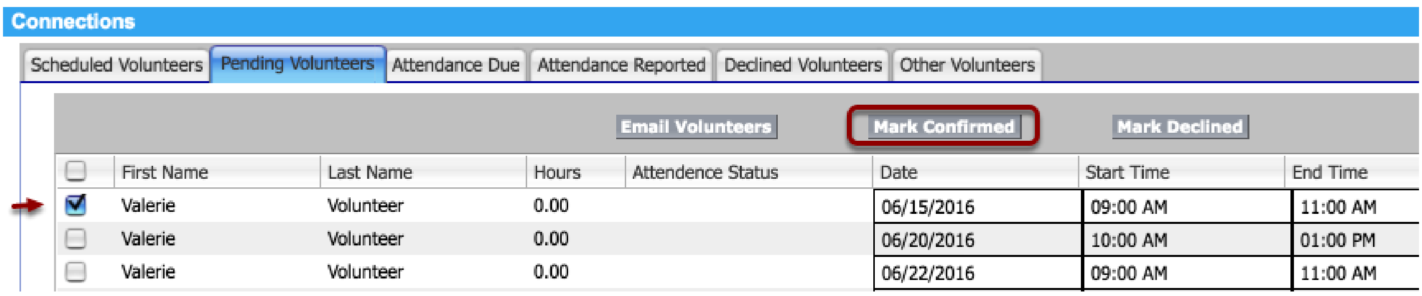
The volunteer coordinator will visit the occurrence record for this volunteer opportunity, and can click on the PENDING VOLUNTEERS tab to see volunteers who have expressed interest but not yet been confirmed



If they want to find out more about a volunteer, you can view their contact record by going to the connections related list to the occurrence - and clicking on the volunteer name. They can also email the volunteer if they wish to ask questions before confirming.

Check the box of the volunteer you wish to email, and then click on the Email Members button. (If you wish to email multiple volunteers at once, put a check box next to the name of each connection

To confirm a volunteer's participation in the occurrence put a check box next to the name of the volunteer(s) you wish to confirm, and then click the "Mark Confirmed" button



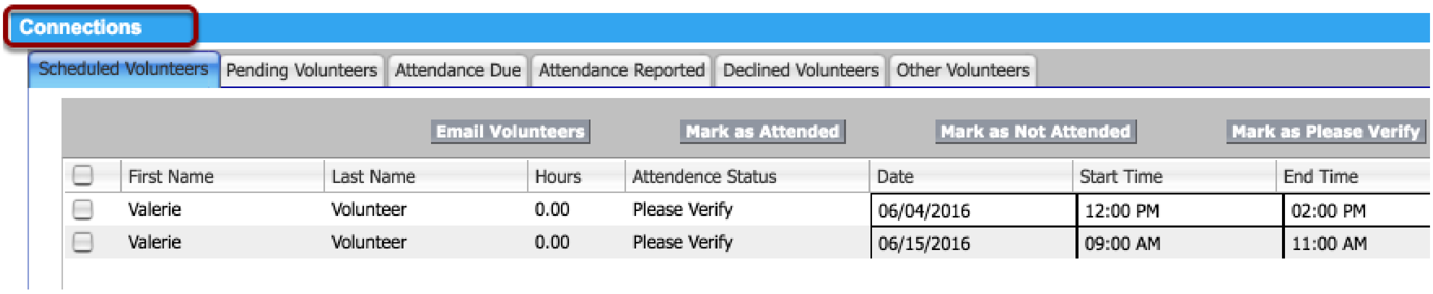
For Date and Time Specific opportunities the date, start time and end time will already be populated for you.

For Individually Scheduled Opportunities - Express Interest with Schedule, the date, start time and end time(s) the volunteer wishes to schedule themselves for will be filled in for you.

For Individually Scheduled Opportunities - Express Interest Only - you typically don't confirm the volunteers. But if you wish to you must first set a start date and time and end date and time before confirming the volunteer.

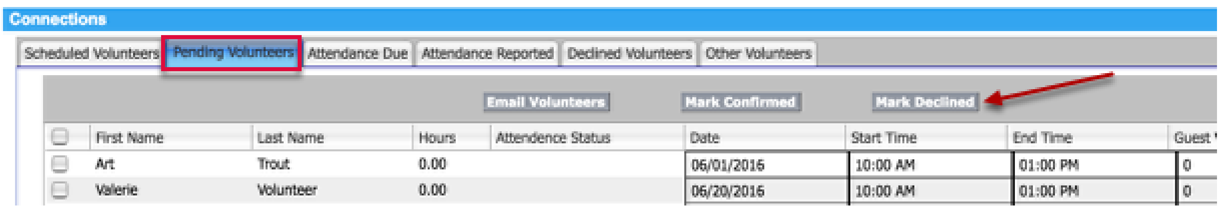
Put a check mark next to the volunteer(s) you wish to confirm for the listed dates, start times and end times, and click the Mark Confirmed Button.

Doing this will move them from the Pending Volunteers Tab, to the Scheduled Volunteers Tab



We've now confirmed Valerie as a volunteer. Her attendance status is "Please verify" and will remain that way until you mark attendance after the opportunity has taken place.

Back in the pending tab, After contacting Art Trout, we've decided to decline him as a volunteer.



To do so, check the box next to her name and click the mark Declined button.

Clicking the "Mark Declined" button gives you a list of options, so you can note why the volunteer was declined.

If a volunteer removes themselves from an opportunity themselves (which they can do in their member account), the connection will appear marked as DECLINED - Removed Themselves.

The declined status of a volunteer will appear in the "Decline Reason" column for easy reference.

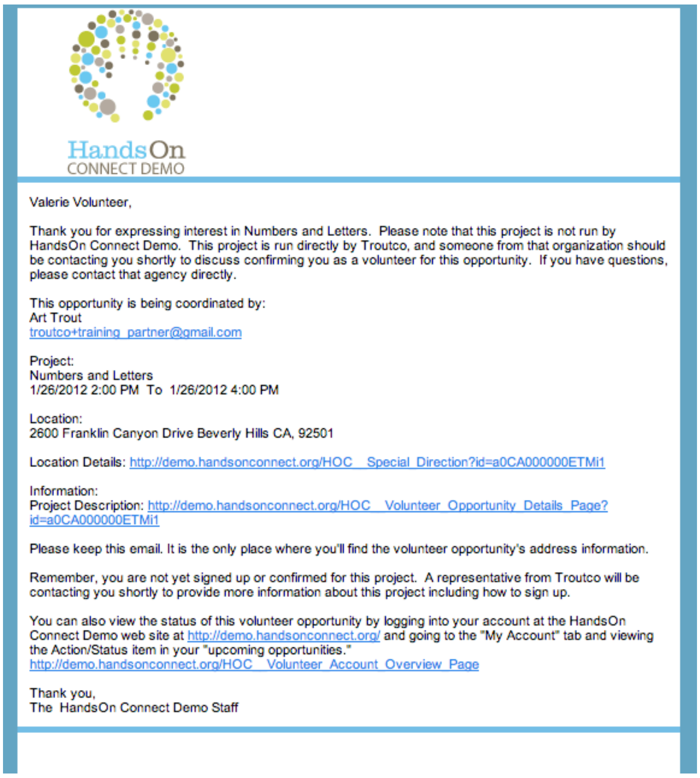
After selecting a decline reason, the volunteer will be moved to the Declined Volunteers Tab.

Emails sent to date and time specific - 'express interest' volunteers and opportunity coordinators

Volunteers who 'express interest' are sent an email notifying them that their interest has been communicated to the partner organization.

After the partner organization confirms or denies the volunteer, email messages are sent notifying the volunteer:

Email sent to Volunteer when Expressing Interest in an Opportunity



HandsOn
CONNECT DEMO

Valerie Volunteer,

Thank you for expressing interest in Numbers and Letters. Please note that this project is not run by HandsOn Connect Demo. This project is run directly by Troutco, and someone from that organization should be contacting you shortly to discuss confirming you as a volunteer for this opportunity. If you have questions, please contact that agency directly.

This opportunity is being coordinated by:
Art Trout
troutco+training_partner@gmail.com

Project:
Numbers and Letters
1/26/2012 2:00 PM To 1/26/2012 4:00 PM

Location:
2600 Franklin Canyon Drive Beverly Hills CA, 92501

Location Details: http://demo.handsonconnect.org/HOC__Special_Direction?id=a0CA000000ETMi1

Information:
Project Description: http://demo.handsonconnect.org/HOC__Volunteer_Opportunity_Details_Page?id=a0CA000000ETMi1

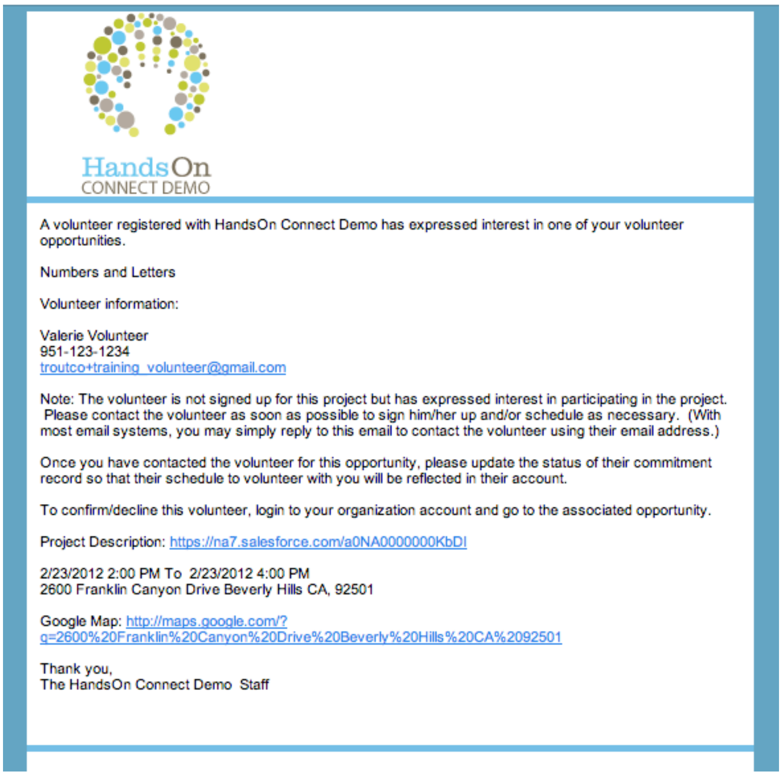
Please keep this email. It is the only place where you'll find the volunteer opportunity's address information.

Remember, you are not yet signed up or confirmed for this project. A representative from Troutco will be contacting you shortly to provide more information about this project including how to sign up.

You can also view the status of this volunteer opportunity by logging into your account at the HandsOn Connect Demo web site at http://demo.handsonconnect.org/ and going to the "My Account" tab and viewing the Action/Status item in your "upcoming opportunities."
http://demo.handsonconnect.org/HOC__Volunteer_Account_Overview_Page

Thank you,
The HandsOn Connect Demo Staff

Email sent to Opportunity Coordinator when a volunteer expresses interest



HandsOn CONNECT DEMO

A volunteer registered with HandsOn Connect Demo has expressed interest in one of your volunteer opportunities.

Numbers and Letters

Volunteer information:

Valerie Volunteer
951-123-1234
troutco+training_volunteer@gmail.com

Note: The volunteer is not signed up for this project but has expressed interest in participating in the project. Please contact the volunteer as soon as possible to sign him/her up and/or schedule as necessary. (With most email systems, you may simply reply to this email to contact the volunteer using their email address.)

Once you have contacted the volunteer for this opportunity, please update the status of their commitment record so that their schedule to volunteer with you will be reflected in their account.

To confirm/decline this volunteer, login to your organization account and go to the associated opportunity.

Project Description: https://na7.salesforce.com/a0NA0000000KbDI

2/23/2012 2:00 PM To 2/23/2012 4:00 PM
2600 Franklin Canyon Drive Beverly Hills CA, 92501

Google Map: http://maps.google.com/?q=2600%20Franklin%20Canyon%20Drive%20Beverly%20Hills%20CA%2092501

Thank you,
The HandsOn Connect Demo Staff

Email sent to volunteer when they are confirmed as a volunteer by the opportunity coordinator

HandsOn
CONNECT DEMO

Dear Valerie Volunteer

Thanks for expressing interest in the following volunteer opportunity: Numbers and Letters

We are delighted to have you as a volunteer and have scheduled you to attend this opportunity from 3/22/2012 2:00 PM to 3/22/2012 4:00 PM

This opportunity is being coordinated by:
Troutco
Art Trout
troutco+training_partner@gmail.com

Location:
2600 Franklin Canyon Drive Beverly Hills CA, 92501

Google Map: http://maps.google.com/?q=2600%20Franklin%20Canyon%20Drive%20Beverly%20Hills%20CA%2092501

Information:
Project Description - https://na7.salesforce.com/a0NA0000000KbDI

Please keep this email. It is the only place where you'll find this opportunity's address information. Art Trout [troutco+training_partner@gmail.com]

You can also view the status of this volunteer opportunity by logging into your account at the HandsOn Connect Demo web site at http://demo.handsonconnect.org/ and going to the "My Account" tab and viewing the Action/Status item in your "upcoming opportunities."
http://demo.handsonconnect.org/HOC__Volunteer_Account_Overview_Page

If for some reason you cannot participate, please let us know as soon as possible so another volunteer can take your place. Follow the link below to go to the "My Account" tab at the HandsOn Connect Demo web site where you can remove yourself from the "Upcoming Opportunities" section:

http://demo.handsonconnect.org/HOC__Volunteer_Account_Overview_Page

Email sent to volunteer when they are declined as a volunteer by the opportunity coordinator

HandsOn
CONNECT DEMO

Thank you for your interest in participating in the following volunteer Numbers and Letters:

At this time Troutco has determined that they cannot schedule you to participate in this particular opportunity, but we hope you will continue to contribute your time and skills to our community.
You can search for other volunteer opportunities with Troutco and other organizations in your community by visiting the HandsOn Connect Demo website by clicking on this link:

http://demo.handsonconnect.org/HOC__Volunteer_Opportunity_Search_Page

If you have additional questions about why you were not scheduled for this opportunity, you can contact:
Troutco
Art Trout
troutco+training_partner@gmail.com

Thanks:
The HandsOn Connect Demo Staff

For Individually Scheduled Opportunities:

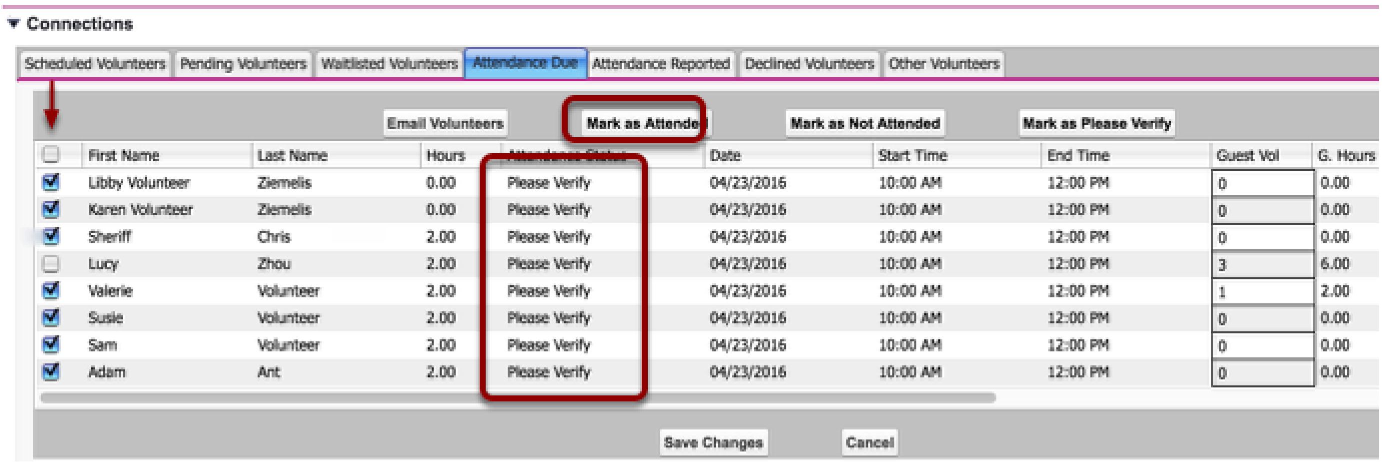
For individually scheduled opportunities a volunteer is sent one email when they propose one or more dates they'd like to volunteer.

When they are confirmed for multiple dates at once, only one email is sent letting them know they've been confirmed for one or more dates. The volunteer can log into their account and see the date(s) they have been confirmed for and can then add those dates to their calendar using the 'add to calendar' link in their 'upcoming opportunities' listing.

Marking Attendance and verifying service hours

After an occurrence has taken place, best practices dictate that you should verify the attendance and service hours of all confirmed, connected volunteers.   This updates their volunteer service history in their account on the public site, and updates their civic transcript.

Go to the Attendance Due Tab in the occurrence's connection grid



	First Name	Last Name	Hours	Attendance Status	Date	Start Time	End Time	Guest Vol	G. Hours
☑	Libby Volunteer	Ziemelis	0.00	Please Verify	04/23/2016	10:00 AM	12:00 PM	0	0.00
☑	Karen Volunteer	Ziemelis	0.00	Please Verify	04/23/2016	10:00 AM	12:00 PM	0	0.00
☑	Sheriff	Chris	2.00	Please Verify	04/23/2016	10:00 AM	12:00 PM	0	0.00
☐	Lucy	Zhou	2.00	Please Verify	04/23/2016	10:00 AM	12:00 PM	3	6.00
☑	Valerie	Volunteer	2.00	Please Verify	04/23/2016	10:00 AM	12:00 PM	1	2.00
☑	Susie	Volunteer	2.00	Please Verify	04/23/2016	10:00 AM	12:00 PM	0	0.00
☑	Sam	Volunteer	2.00	Please Verify	04/23/2016	10:00 AM	12:00 PM	0	0.00
☑	Adam	Ant	2.00	Please Verify	04/23/2016	10:00 AM	12:00 PM	0	0.00

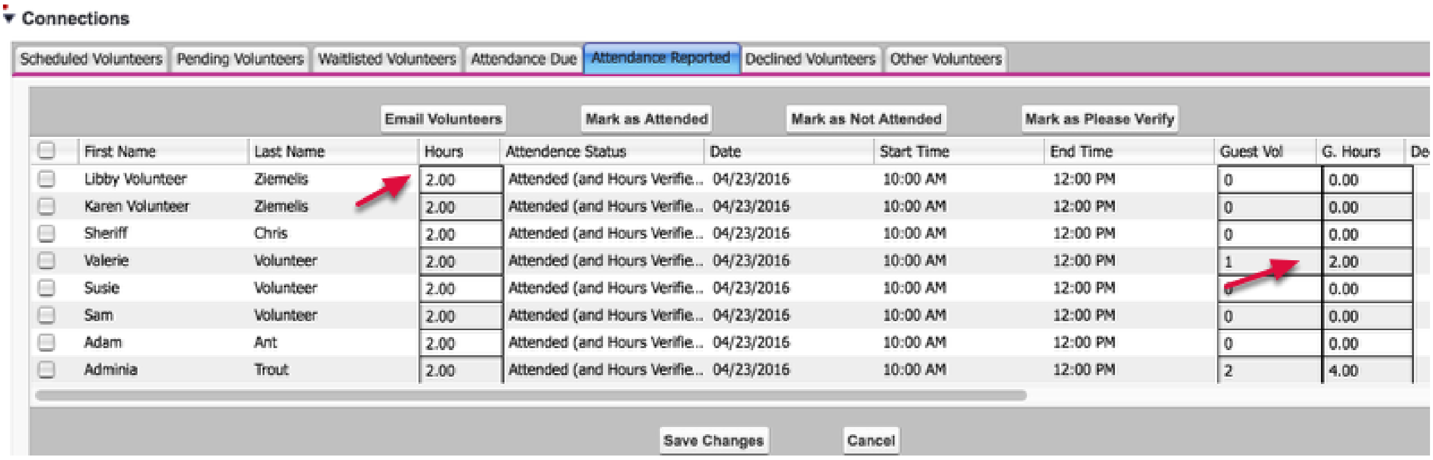
Put a checkbox next to each volunteer who attended, and click the "Mark as Attended" button.

The connections will automatically have their hours and guest hours calculated (based on the start time and end time) and the connections will be moved to the "Attendance Reported Tab"

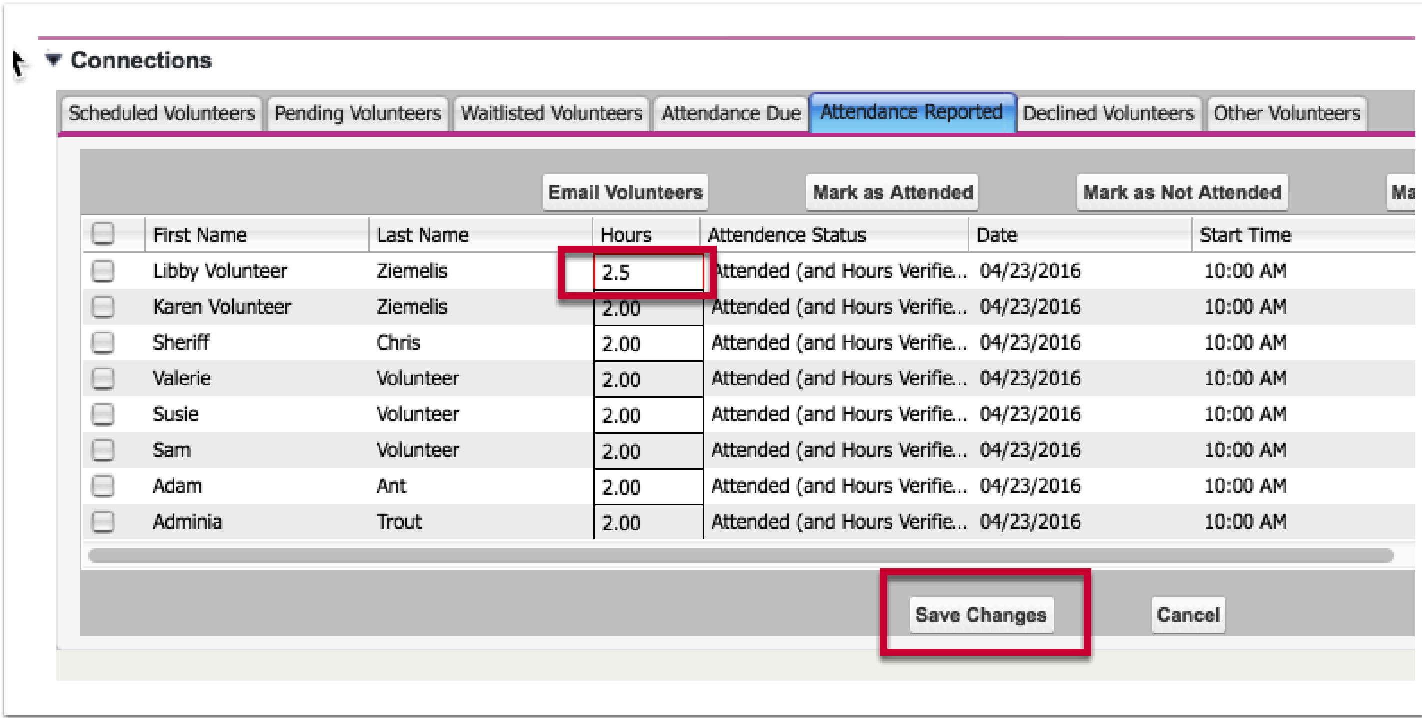
Then repeat the process for anyone who did not attend. Put a check box next to those who didn't attend and click the "Mark as Not Attended Button".

You want to ensure that no one is left with a status of "Please Verify". Then your attendance will be completed for this occurrence. (Note: If you make a mistake, you can change a connection back to "Please verify".

The Hours for volunteers and any ANON guests will be automatically calculated based on the start and end time of the occurrence



If someone stayed longer than the scheduled time you can edit the hours

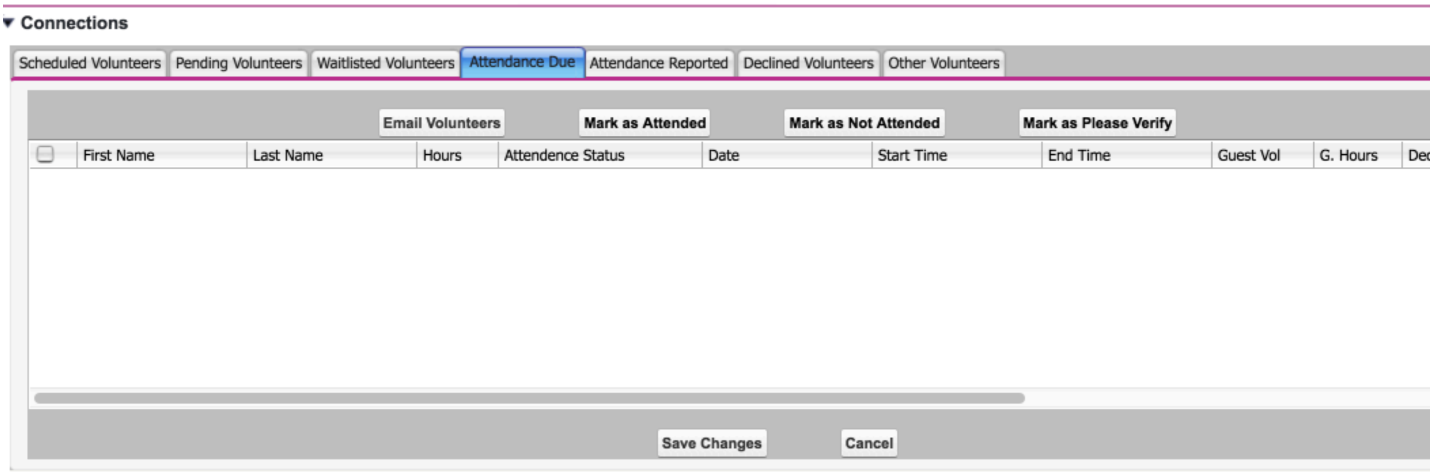


Click on the Hours column and change the hours as desired. Press on Save Changes to record the change in hours.

Volunteers marked as 'not attended' will get 0 hours.

Note: When volunteers post feedback from the public site, you'll see star ratings appear in the rating column (scroll to the right to see this column). Click on the related list of connections below the connection grid, to go to an individual connection and read the feedback.

Make sure your attendance due tab is empty and you'll know all attendance for that occurrence has been recorded.



All attendance due connections are now in the attendance reported tab - you're done!

The statistics from the completed attendance information will be rolled up in the summary fields after you've refreshed the page

The exact layout of the occurrence statistics will vary depending on the way your page layout is set up. Be sure to refresh the page if you want to view the statistics right away.

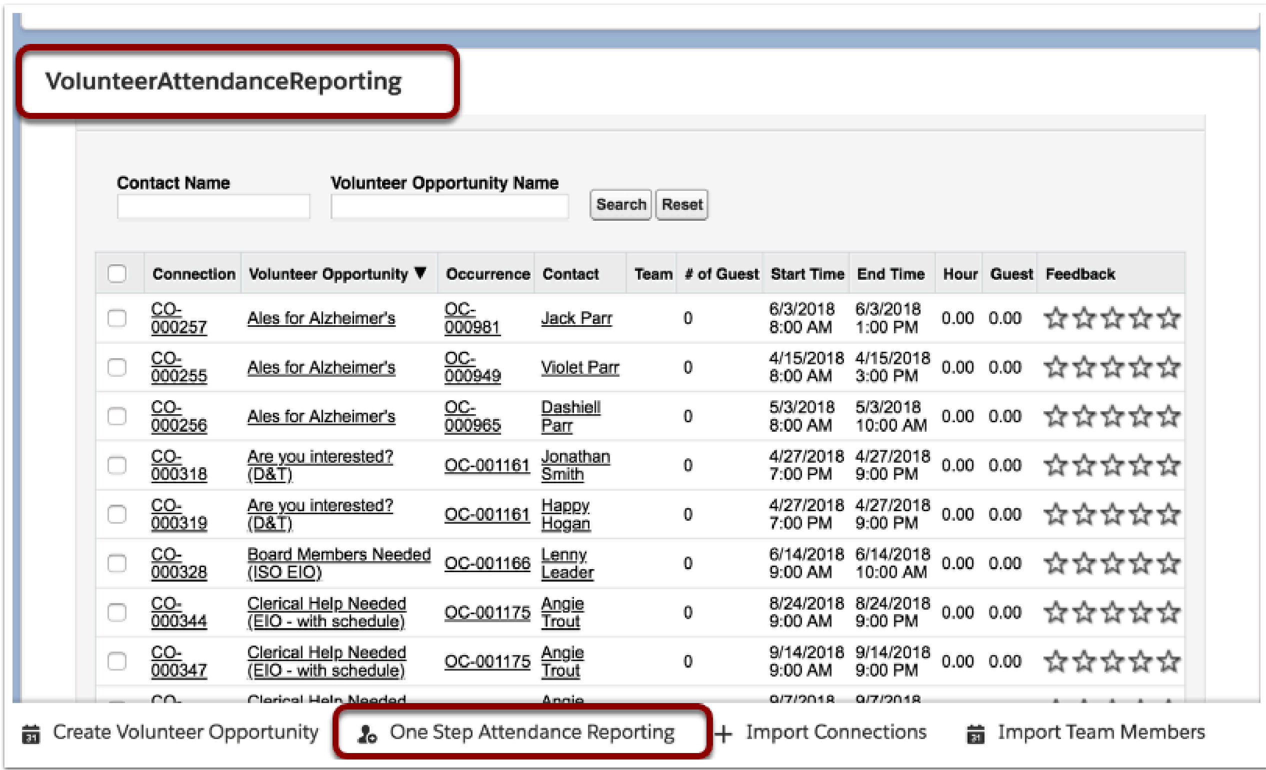
One Step Volunteer Attendance Reporting

While you can report attendance via the connections grid in each occurrence record - but One Step Volunteer Attendance Reporting allows you to report attendance for ANY occurrence where attendance is due, all from one place. It saves a lot of jumping from record to record and makes reporting attendance quick and easy!!!

Why should you keep attendance reporting up-to-date? It updates your volunteer's records and history so they can have an accurate record of their engagement with you - and your reports of volunteer engagement will have meaningful information! You'll know exactly how many hours each volunteer has contributed, and how much impact each project has.

How to access One Step Volunteer Attendance Reporting

In HOC Lightning - One Step Attendance Reporting can be found on the utility bar on the bottom of every page. Clicking on this object opens a pop-up with the One Step Attendance Reporting so that's its easily accessible. In many cases, its also placed as a section on your Lightning Home Page so you see it the moment you log in.



In Salesforce Classic: On the left sidebar, you'll see a widget named "Report Volunteer Attendance" Click on the link "One Step Volunteer Attendance Reporting" to launch the new one-step attendance reporting page.

The One Step Reporting Page

By default, all past connections in confirmed / please verify status will appear. If you've not been regularly reporting attendance, there may be quite a few - but with this feature you'll be able to quickly catch up on any attendance reporting for your volunteers.

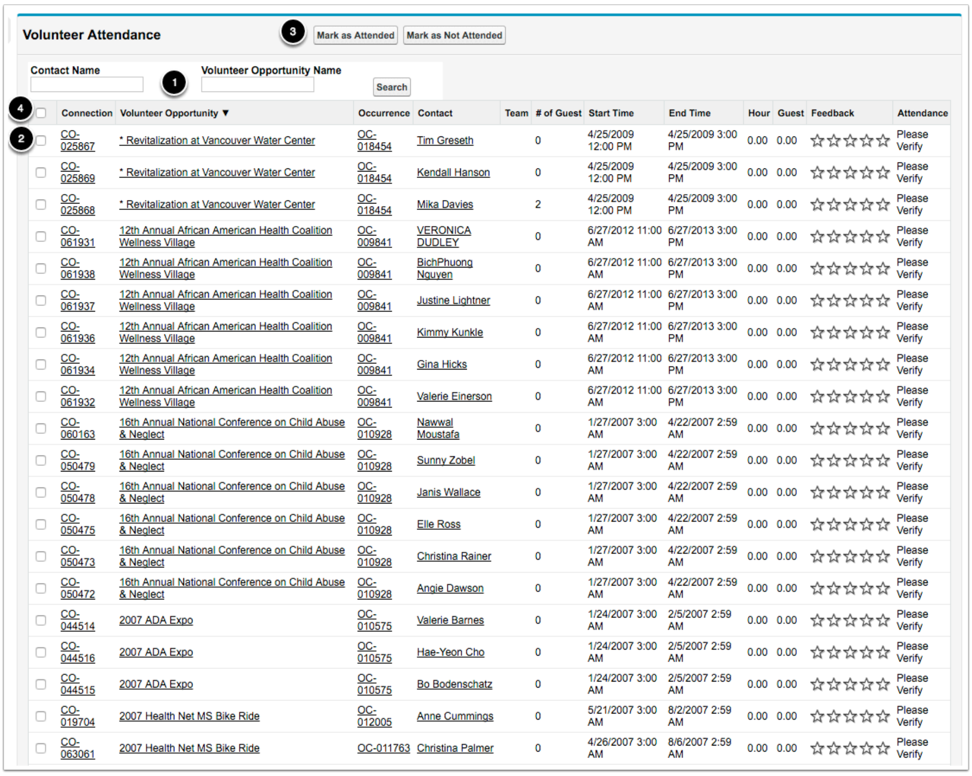
Features:

1. Use search filters to narrow the connections shown. You can search for all the connections for a contact, or all the connections for a Volunteer Opportunity. (*Note: the * character isn't used for search here. If you put in Valerie for a contact name, you'll get anyone with the name Valerie. If you type in 12th for Volunteer Opportunity Name - you'll get any opportunity with the word 12th in it.)*

2. Select one or more check-boxes to select connections and then 3) click on Mark as attended or Mark as Not Attended. The connections will be updated and removed from the list of volunteer attendance awaiting verification. (If no search results show up - then ALL your connections are verified!)

3. After selected the connections - click either "Mark as Attended" or "Mark as Not Attended" to report their attendance. The hours will automatically be populated based on the start time and end time of the connection.

4. Click the top box to select all the connections currently visible on the page.

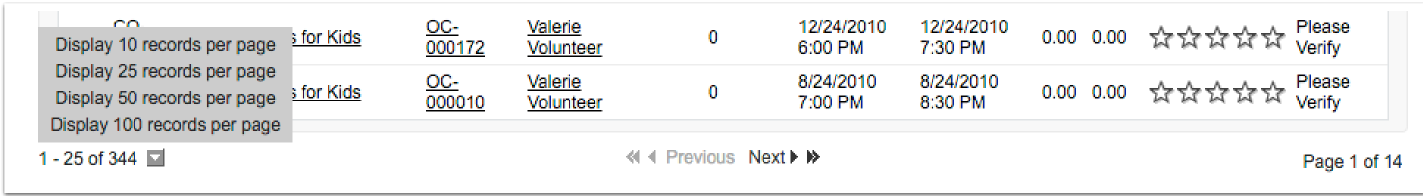


Volunteer Attendance 3 Mark as Attended Mark as Not Attended

Contact Name 1 Volunteer Opportunity Name Search

Connection	Volunteer Opportunity ▼	Occurrence	Contact	Team	# of Guest	Start Time	End Time	Hour	Guest	Feedback	Attendance
CO-025867	* Revitalization at Vancouver Water Center	OC-018454	Tim Greseth		0	4/25/2009 12:00 PM	4/25/2009 3:00 PM	0.00	0.00		Please Verify
CO-025869	* Revitalization at Vancouver Water Center	OC-018454	Kendall Hanson		0	4/25/2009 12:00 PM	4/25/2009 3:00 PM	0.00	0.00		Please Verify
CO-025868	* Revitalization at Vancouver Water Center	OC-018454	Mika Davies		2	4/25/2009 12:00 PM	4/25/2009 3:00 PM	0.00	0.00		Please Verify
CO-061931	12th Annual African American Health Coalition Wellness Village	OC-009841	VERONICA DUDLEY		0	6/27/2012 11:00 AM	6/27/2013 3:00 PM	0.00	0.00		Please Verify
CO-061938	12th Annual African American Health Coalition Wellness Village	OC-009841	BichPhuong Nguyen		0	6/27/2012 11:00 AM	6/27/2013 3:00 PM	0.00	0.00		Please Verify
CO-061937	12th Annual African American Health Coalition Wellness Village	OC-009841	Justine Lightner		0	6/27/2012 11:00 AM	6/27/2013 3:00 PM	0.00	0.00		Please Verify
CO-061936	12th Annual African American Health Coalition Wellness Village	OC-009841	Kimmy Kunkle		0	6/27/2012 11:00 AM	6/27/2013 3:00 PM	0.00	0.00		Please Verify
CO-061934	12th Annual African American Health Coalition Wellness Village	OC-009841	Gina Hicks		0	6/27/2012 11:00 AM	6/27/2013 3:00 PM	0.00	0.00		Please Verify
CO-061932	12th Annual African American Health Coalition Wellness Village	OC-009841	Valerie Einerson		0	6/27/2012 11:00 AM	6/27/2013 3:00 PM	0.00	0.00		Please Verify
CO-060163	16th Annual National Conference on Child Abuse & Neglect	OC-010928	Nawwal Moustafa		0	1/27/2007 3:00 AM	4/22/2007 2:59 AM	0.00	0.00		Please Verify
CO-050479	16th Annual National Conference on Child Abuse & Neglect	OC-010928	Sunny Zobel		0	1/27/2007 3:00 AM	4/22/2007 2:59 AM	0.00	0.00		Please Verify
CO-050478	16th Annual National Conference on Child Abuse & Neglect	OC-010928	Janis Wallace		0	1/27/2007 3:00 AM	4/22/2007 2:59 AM	0.00	0.00		Please Verify
CO-050475	16th Annual National Conference on Child Abuse & Neglect	OC-010928	Elle Ross		0	1/27/2007 3:00 AM	4/22/2007 2:59 AM	0.00	0.00		Please Verify
CO-050473	16th Annual National Conference on Child Abuse & Neglect	OC-010928	Christina Rainer		0	1/27/2007 3:00 AM	4/22/2007 2:59 AM	0.00	0.00		Please Verify
CO-050472	16th Annual National Conference on Child Abuse & Neglect	OC-010928	Angie Dawson		0	1/27/2007 3:00 AM	4/22/2007 2:59 AM	0.00	0.00		Please Verify
CO-044514	2007 ADA Expo	OC-010575	Valerie Barnes		0	1/24/2007 3:00 AM	2/5/2007 2:59 AM	0.00	0.00		Please Verify
CO-044516	2007 ADA Expo	OC-010575	Hae-Yeon Cho		0	1/24/2007 3:00 AM	2/5/2007 2:59 AM	0.00	0.00		Please Verify
CO-044515	2007 ADA Expo	OC-010575	Bo Bodenschatz		0	1/24/2007 3:00 AM	2/5/2007 2:59 AM	0.00	0.00		Please Verify
CO-019704	2007 Health Net MS Bike Ride	OC-012005	Anne Cummings		0	5/21/2007 3:00 AM	8/2/2007 2:59 AM	0.00	0.00		Please Verify
CO-063061	2007 Health Net MS Bike Ride	OC-011763	Christina Palmer		0	4/26/2007 3:00 AM	8/6/2007 2:59 AM	0.00	0.00		Please Verify

5. You can choose to display 10, 25, 50 or 100 connections at a time. (Bottom of page). No more than 100 connections can be updated at one time.



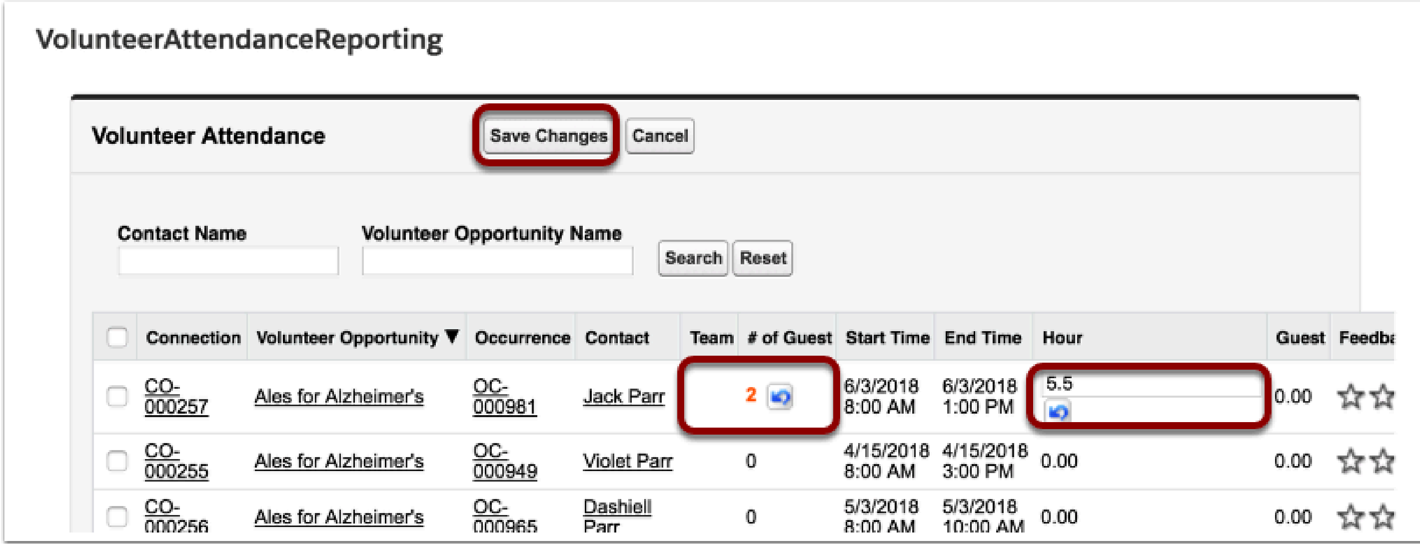
Connections can be edited if desired before submitting as attended or not attended:

If you wish to change the start time or end time of a connection, or just to give 'extra hours' because a volunteer stayed longer than the scheduled time, you can do so by clicking on that field and editing it. You can also add 'guest volunteers' by clicking on that field.

Make all your changes BEFORE marking the volunteer as attended or not attended because the record will be removed from the form once attendance has been reported. (Don't worry if you make a mistake - you can always go to the connection itself in its occurrence and update the record AFTER its been removed from the one step reporting grid.)

After editing a record, you will need to click on the SAVE button, before you can report them as attended or not attended:

See this example where we are adding two guests, and are going to credit the volunteer with 5.5 (instead of 5 hours)


VolunteerAttendanceReporting
Volunteer Attendance
Save Changes
Cancel
Contact Name
Volunteer Opportunity Name
Search
Reset
Connection
Volunteer Opportunity
Occurrence
Contact
Team
# of Guest
Start Time
End Time
Hour
Guest
Feedba
CO-000257
Ales for Alzheimer's
OC-000981
Jack Parr
2
6/3/2018 8:00 AM
6/3/2018 1:00 PM
5.5
0.00
CO-000255
Ales for Alzheimer's
OC-000949
Violet Parr
0
4/15/2018 8:00 AM
4/15/2018 3:00 PM
0.00
0.00
CO-000256
Ales for Alzheimer's
OC-000965
Dashiell Parr
0
5/3/2018 8:00 AM
5/3/2018 10:00 AM
0.00
0.00

The Connection Record

Overview of the Connection Object

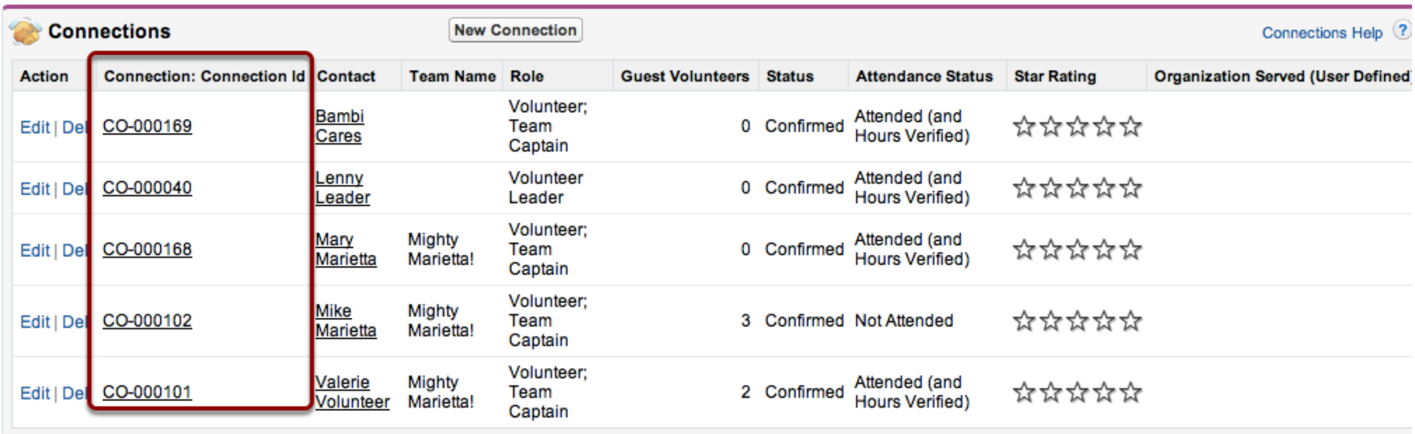
While most work you do with connections can be done from the occurrence record's connection grid -- there will be times where you'll want to edit individual connection records themselves.

If you are updating info on only one connection, this is often the easiest approach.

This article will explain the function of the various fields in the Connection Record.

In some instances of HOC, the object "Connections" is renamed to "Volunteer Connections".

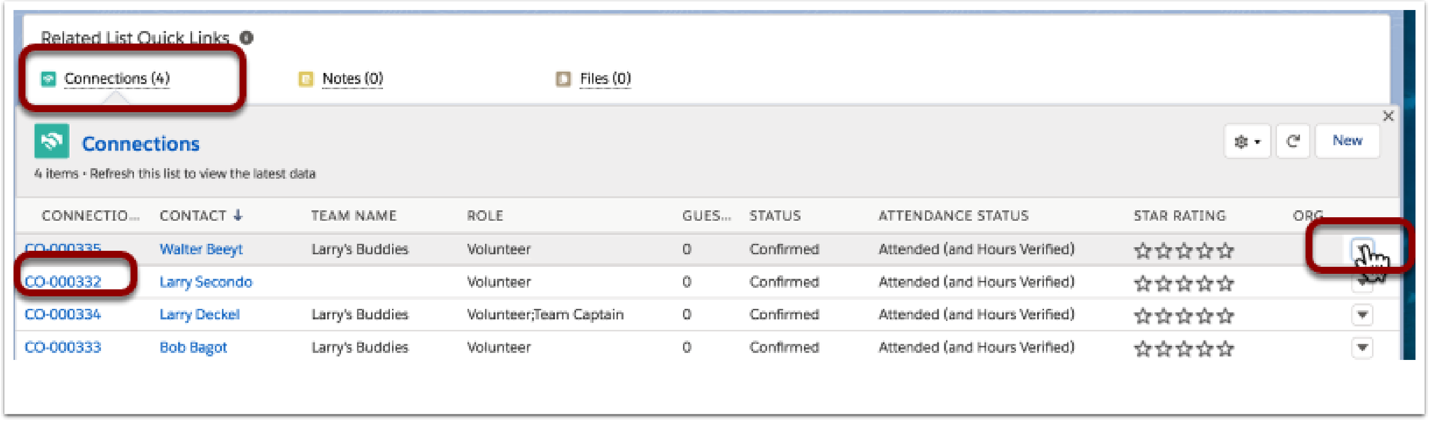
(Classic) Just below the connections grid in the occurrence record, is the related list for all connections.


Connections | New Connection | Connections Help

Action	Connection: Connection Id	Contact	Team Name	Role	Guest Volunteers	Status	Attendance Status	Star Rating	Organization Served (User Defined)
Edit | Del	CO-000169	Bambi Cares		Volunteer; Team Captain	0	Confirmed	Attended (and Hours Verified)	☆☆☆☆☆	
Edit | Del	CO-000040	Lenny Leader		Volunteer Leader	0	Confirmed	Attended (and Hours Verified)	☆☆☆☆☆	
Edit | Del	CO-000168	Mary Marietta	Mighty Marietta!	Volunteer; Team Captain	0	Confirmed	Attended (and Hours Verified)	☆☆☆☆☆	
Edit | Del	CO-000102	Mike Marietta	Mighty Marietta!	Volunteer; Team Captain	3	Confirmed	Not Attended	☆☆☆☆☆	
Edit | Del	CO-000101	Valerie Volunteer	Mighty Marietta!	Volunteer; Team Captain	2	Confirmed	Attended (and Hours Verified)	☆☆☆☆☆	

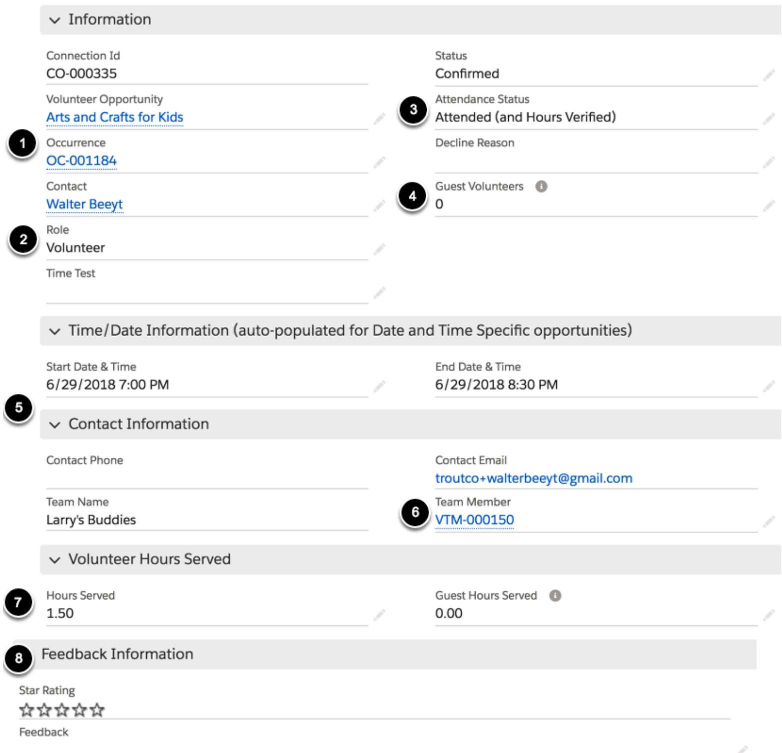
To get to an individual connection record, click on the connection ID of an individual connection.

(Lightning) You can find the related connections in the related objects list at the top of the page:



To get to an individual connection record, click on the connection ID of an individual connection. You can also drop down the triangle to the right, and directly reach the connection in Edit Mode if you wish to edit it.

The Connection Record Layout



1. Details of which opportunity, which occurrence ID and which Contact the connection is for. These are all lookup fields to related objects and define who the volunteer is, and what opportunity and occurrence they are connected to.
2. The role of the connection. (See below). By default, this will always be volunteer when you create a connection administratively.
3. The current status, attendance status, and if declined, the decline reason of the connection (See below for detail on these three picklists)
4. # of guests this connection has brought (by default this is 0.

The items in Information section are the only ones you need to fill in when creating a connection administratively and all but guest volunteers are required.

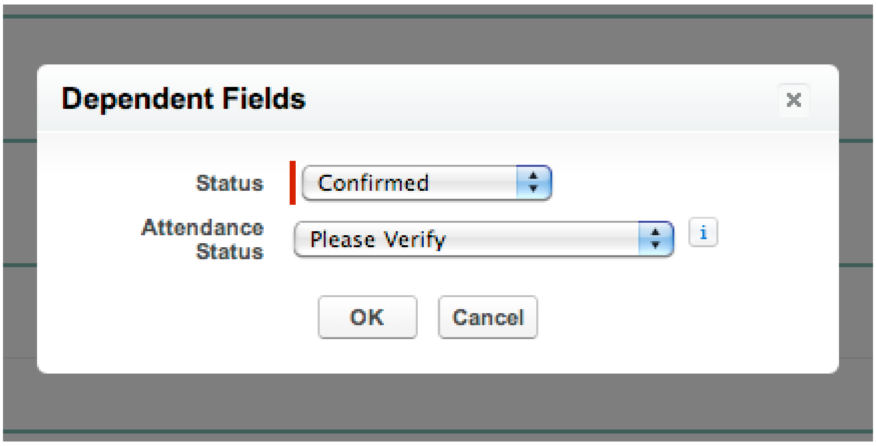
5. The start and end date and time of the connection. (Automatically populated when you save the record for a date and time specific occurrence.) Only fill this in if you are creating a connection to an Individually Scheduled Opportunity. The contact info is also filled in automatically for you based on the Contact you select in the first section.

6. Team Member is a lookup field to a Team ID. If the connection is made as part of a team sign-up this will be populated. Team Name is automatically populated when a Team ID has been associated with a connection. If you administratively create a connection for a team member, you need to look up and enter their team member ID. When a team member is a team captain, the ROLE field will add the value "Team Captain".

7. This section is a summary of the hours served via the connection. They are automatically calculated for you when you mark a connection as status "Attended (and hours verified" but you can override the automatic calculation and give someone 'extra hours' if they stayed longer than scheduled.

8. This section shows the Feedback text and star-rating given by a volunteer from the public site.

Status and Attendance Status Picklist are dependent on one another



The Status Field has four possible values, which determine the possible Attendance Status values that can follow:

Here are the statuses and the Attendance Statuses that are possible for each)

1. Pending Approval - the default state for express interest opportunities until confirmed or declined by the managing organization.

- has no associated Attendance Status. No attendance is recorded for connections that were never confirmed or declined.

2. Confirmed - The volunteer is scheduled to attend.

- **Please verify** - is the value you should select when you first administratively create a connection for a future date. (This will have it show up in reports as needing verification after the connection has taken place)
- **Attended (and hours verified)** - (You can only select this attendance status if the end date and time has passed)
- **Not Attended -** (You can only select this attendance status if the end date and time has passed)
- **Canceled** - used when a connection was confirmed, but the occurrence has been cancelled. So attendance was not possible, but its not a case of negligence from the volunteer.

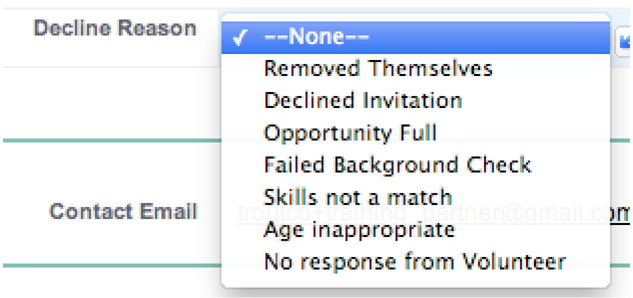
3. Declined - Used if the managing organization decides not to confirm the volunteer, OR if the volunteer removes themselves from the opportunity

- **Declined** - This indicates that a volunteer has removed themselves -- so they declined to attend, but notified the managing organization and freed up space for those on the waiting list)

Waitlisted - the status volunteers are given if they opt to be put on the waitlist for a project with no available space.

- no associated Attendance status values

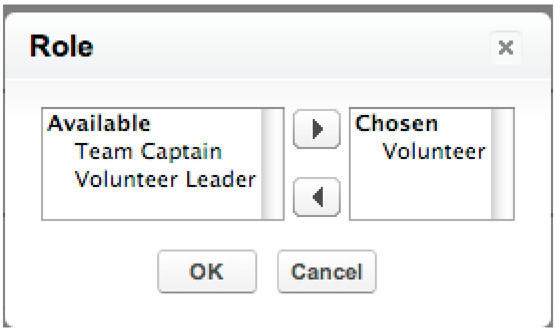
Decline Reason



When a volunteer's status is declined, the declined reason can be stated.   This enables the managing organization to know why they decided NOT to confirm the volunteer.

If the volunteer self-declined by removing themselves from the public site, this picklist value will be "Removed Themselves"

Role



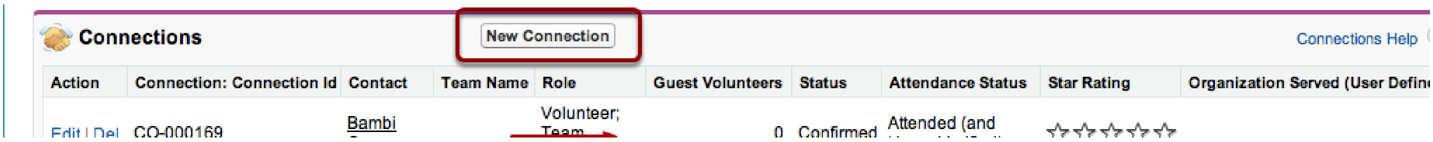
There are three roles a volunteer might have in a connection. Its a multi-picklist as its possible to be all three.

- Volunteer - anyone connected to an occurrence would have the role of volunteer. This is the default setting.
- Team Captain - indicates that the connected volunteer is the captain of the team associated with the connection. (You should populate the team member ID of the team captain in the connection record as well)
- Volunteer Leader - indicates that this volunteer is also a Volunteer Leader for the occurrence. (This gives them access in the Volunteer Leader Sharing Portal to manage the occurrence they are designated a leader for.)

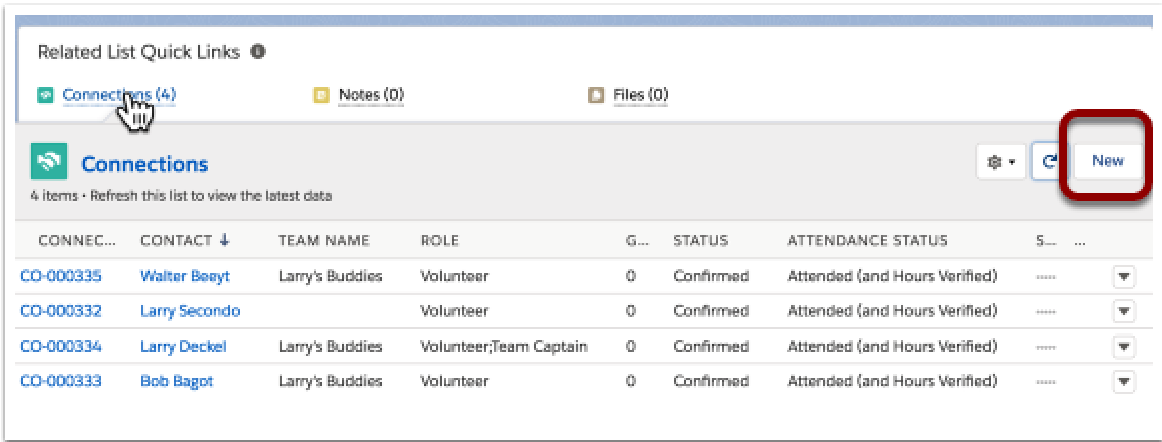
Administratively adding a connection to an occurrence

Most connections are made by the sign-up process from the public site. However, you may wish to add connections administratively to an occurrence. Here's how.

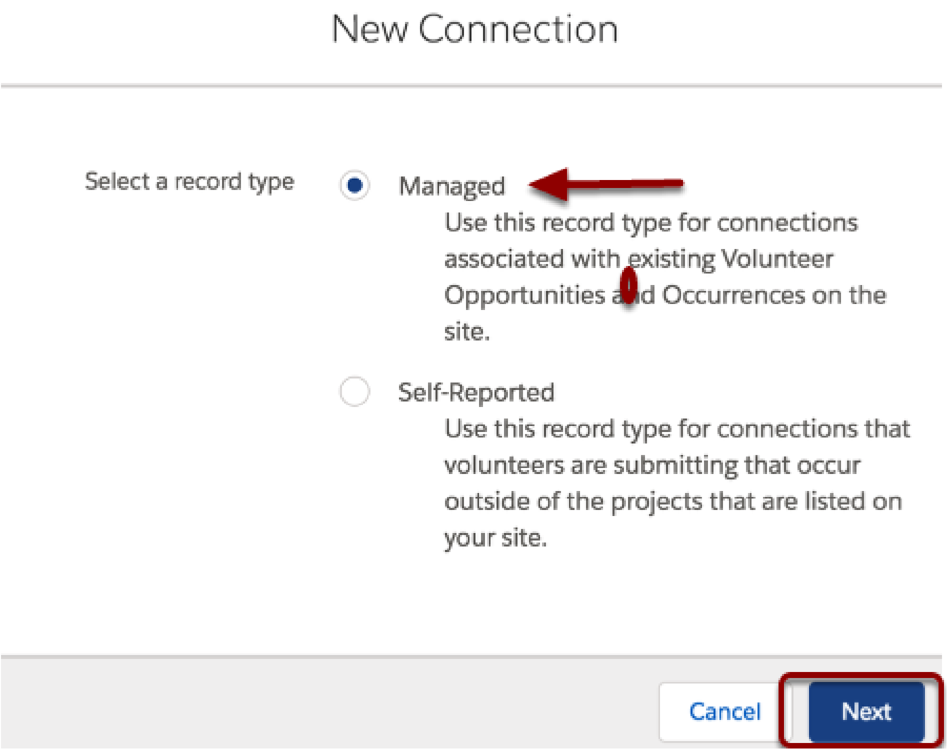
(Classic) Click on the NEW CONNECTION button in the connections related list of the occurrence record:



(Lightning) Click on the New button in the Connections related list

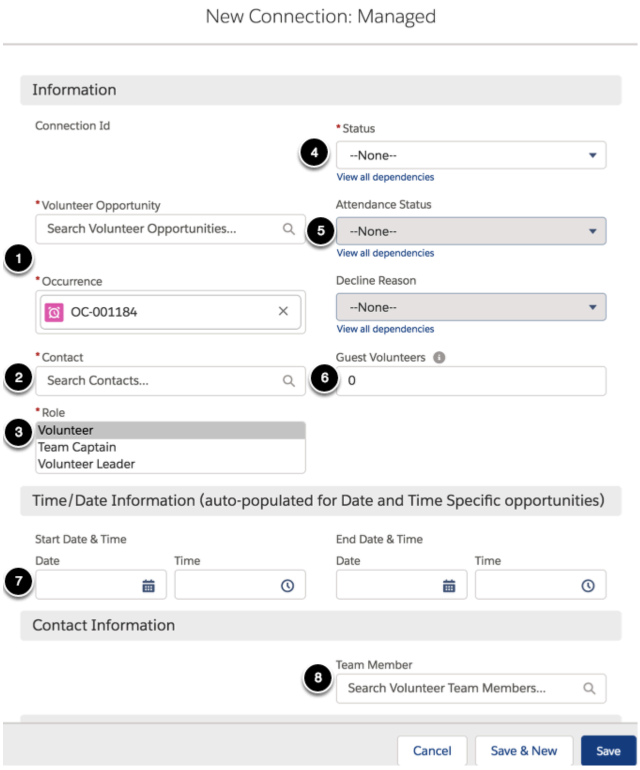


You'll be asked what type of connection to create. Choose "Managed" and click Next.



The other connection type is "Self-Reported", which is used for connections created by volunteers when they self-report a connection using [self-reporting.]()

A new, blank connection record will be created



1. Lookup the Volunteer Opportunity and the Occurrence. When you click on the lookup icon - the correct VO and Occurrence will be at the top of the list as they are the most 'recently viewed' items. Click on them to populate these first two fields. (If you create the connection from the occurrence, the occurrence ID will be automatically filled in for you).

2. Lookup the contact - Click on the lookup icon and find the name of the volunteer or volunteer leader you wish to connect.

3. Set the role of the contact's connection: All Connections should be designated as Volunteer... and if a Volunteer Leader then set them as Volunteer Leader as well! If making a team captain - you'll need to lookup the Team ID of the Team they are associated with and put the Team Member ID record in item 8.

4. Status - Set the status of the connection to "Confirmed" -- since you're likely adding this connection as someone who is, in fact, planning on attending the occurrence.

5. Set the **Attendance Status** to "Please Verify" to indicate that attendance has not yet been verified. (Note: If you're administratively creating a connection for an occurrence that has already taken place.... you would make the attendance status "Attended (and hours verified" and set the hours served in the "Volunteer Hours Served" section. (Note: The hours are automatically filled in when Editing an existing connection - but you have to do this manually if creating a past connection administratively from scratch).

6. Guest Volunteers - If the connection is bringing guests and you wish to hold 'slots' for them - put in the number of guests here.

7. Time/Date Information - this will automatically be filled in for you based on the time and date occurrence you selected above. Only fill this out for Individually Scheduled Opportunities (which have different dates and times for each connection)

8. Team Member - If you wish the connection to be tracked as part of a team the contact is associated with, lookup their team member ID here and populate this field. The team name will automatically be filled in for you after you save the record.

All the required fields are found in the top section of this page layout.

Using the connection record to assign volunteer leaders

When the Opportunity Coordinator associated with an occurrence has the profile Volunteer Leader -- then a connection for that volunteer is automatically created, and they are designated as the Volunteer Leader for that occurrence.

However, its possible to manually add additional volunteer leaders, or promote existing contacts to be Volunteer Leaders as well.

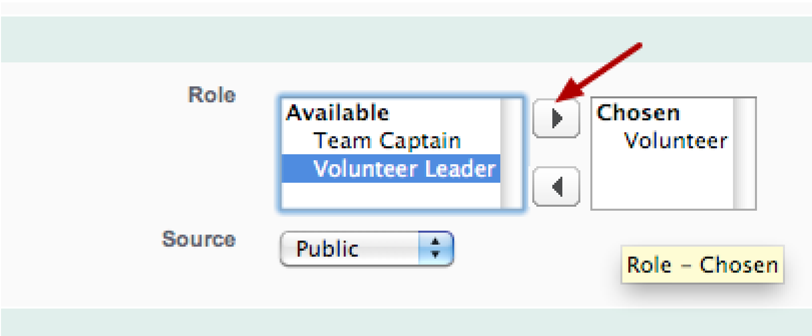
(Volunteer Leaders are volunteers who take responsibility for managing a project on behalf of an organization, and have portal access to report attendance, email volunteers, etc.)

Create a New Connection or edit an existing connection

See this post for details on filling out a new connection record.

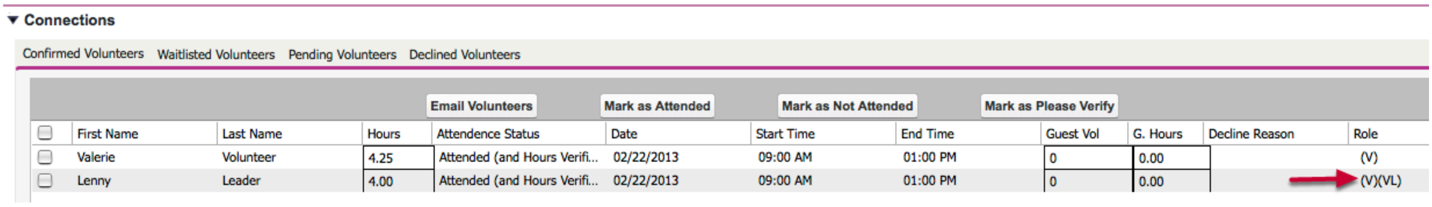
If the contact is already connected as a volunteer, you just need to edit their current connection

Assign the contact the role of Volunteer Leader in the ROLES field of the connection



Select Volunteer Leader from the available roles, and click on the right arrow to add this as a role this volunteer plays in this connection.

The term (VL) now appears next to the volunteer's name indicating they have a leadership role in this connection



▼ Connections

Confirmed Volunteers | Waitlisted Volunteers | Pending Volunteers | Declined Volunteers

Email Volunteers | Mark as Attended | Mark as Not Attended | Mark as Please Verify

	First Name	Last Name	Hours	Attendence Status	Date	Start Time	End Time	Guest Vol	G. Hours	Decline Reason	Role
☐	Valerie	Volunteer	4.25	Attended (and Hours Verifi...	02/22/2013	09:00 AM	01:00 PM	0	0.00		(V)
☐	Lenny	Leader	4.00	Attended (and Hours Verifi...	02/22/2013	09:00 AM	01:00 PM	0	0.00		(V)(VL)

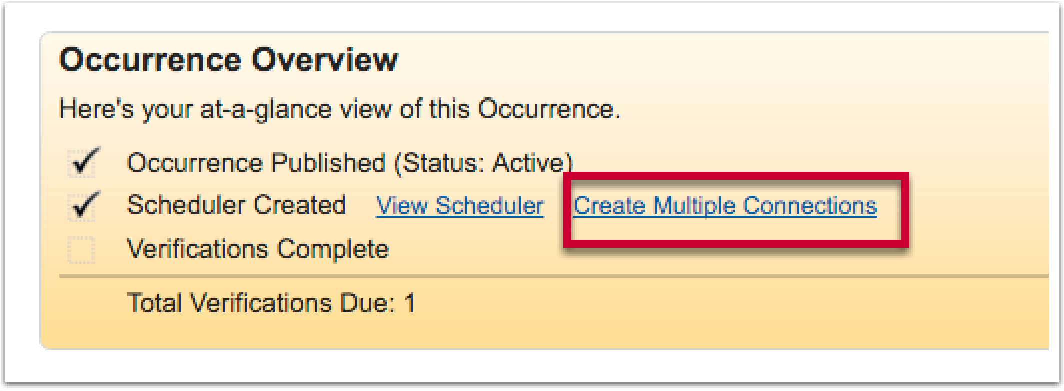
You can assign more than one Volunteer Leader to an opportunity. Anyone assigned the role Volunteer Leader will have access to this occurrence in their Volunteer Leader Portal and will be able to communicate with volunteers, report attendance, etc.

Creating Multiple Connections for Individually Scheduled Opportunities

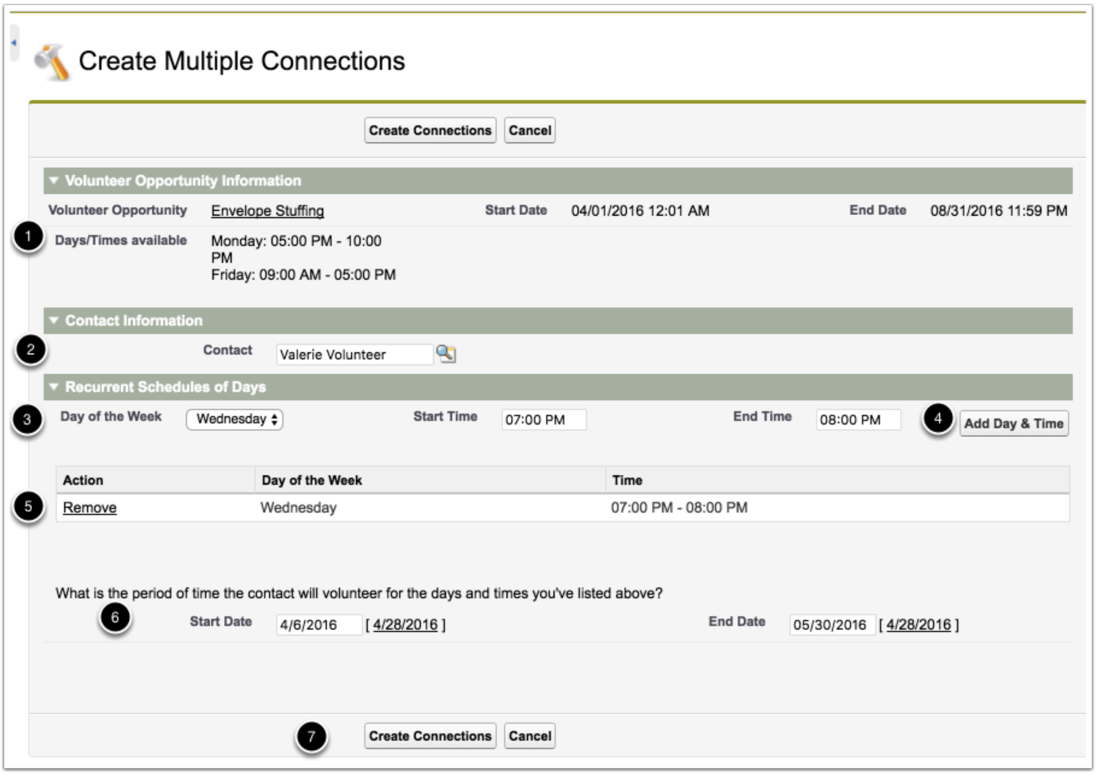
For Individually Scheduled Opportunities (ISOs), volunteers are able to schedule themselves for multiple connections (dates and times) from the public site. These are created in pending status for you to approve.

Alternatively, if you wish to schedule volunteers yourself you can create multiple connections administratively for ISOs. These connections will be in confirmed status since you are creating them. Here's how to schedule a volunteer for multiple connections to an ISO opportunity.

Click on the "Create Multiple Connections" link on the opportunity or occurrence overview



This opens the "Create Multiple Connections" page for that To Be Scheduled Volunteer Opportunity



You can create multiple connections for a volunteer by doing the following:

1. This section tells you the details of the volunteer opportunity you've selected, including its schedule and start and end date.

2. Use the lookup icon and choose the volunteer you wish to schedule

3. Pick a Day of the week, Start Time and End Time for the connections you wish to create.

4. Click the "Add Day & Time" button to add that day of the week to the schedule you are creating which appears below (5). You can add additional days and times to the schedule by picking additional days and times, and clicking on "Add Day & Time" each time until you have the full weekly schedule for the volunteer.

Note: *Even though the published scheduled here is for Mondays and Friday only, you can administratively create connections for any day of the week, giving you the flexibility to schedule volunteers outside of the published weekly schedule.*

6. Indicate the start date and end date of the recurring connections defined in 5.

Note: *You can create connections that occur in the past or in the future or both at once. But you cannot choose dates that fall outside the start date and end date of the volunteer opportunity / occurrence as shown in the summary in section 1. If you wish to schedule outside those dates, you'll* *need to go to the occurrence record and adjust the start date and/or end date of the opportunity/ occurrence.*

7. Click "Create Connections" and the connections will be created for you and appear in the connections grid. All connections created will be in 'confirmed' status. Those for future dates will appear in the "Scheduled Attendance" tab, or any past connections will appear in the "Attendance Due" tab where you can then mark the volunteer as attended.

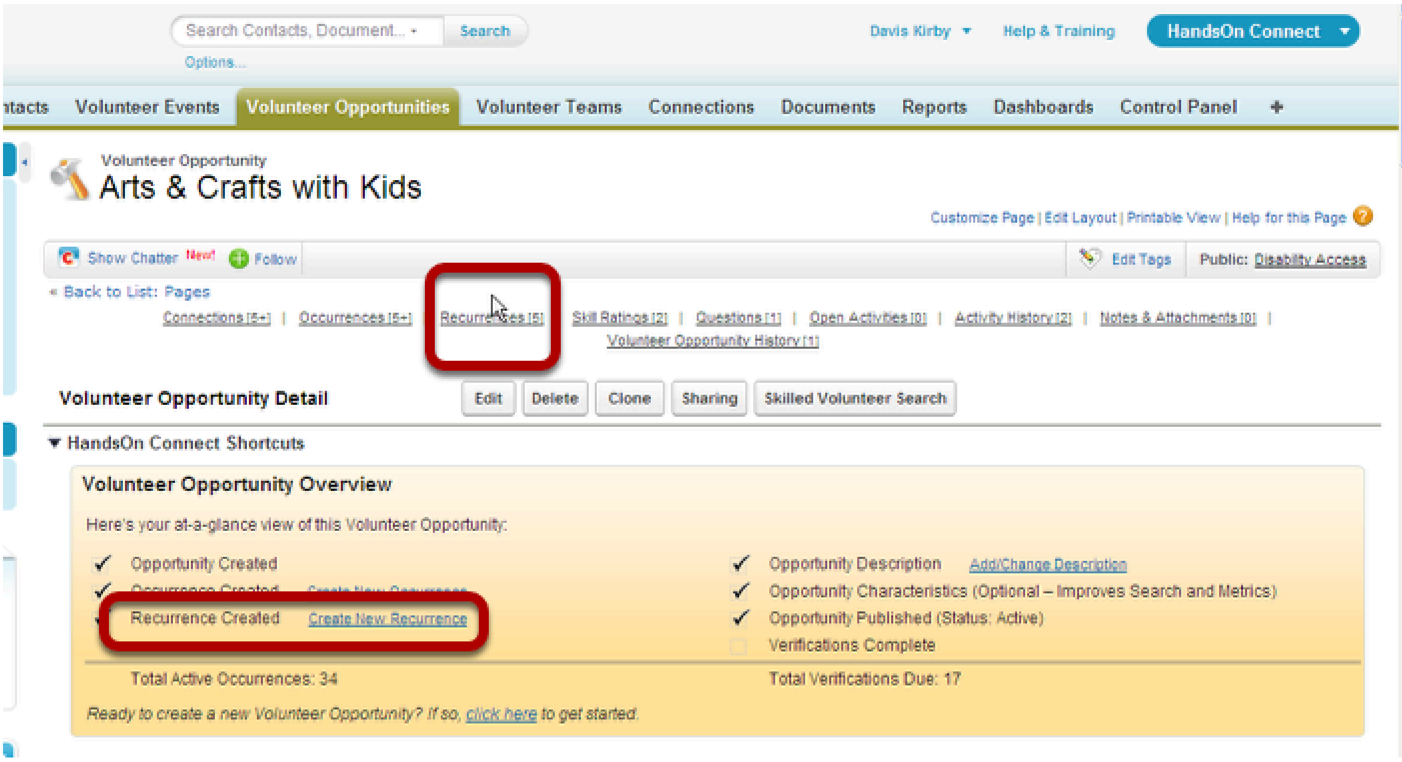
Note: *You cannot create more than 50 connections at one time. If you need to schedule a volunteer for more than 50 connections at once, create 50 and then create 50 more separately.*

Creating recurrences

Creating a Recurrence

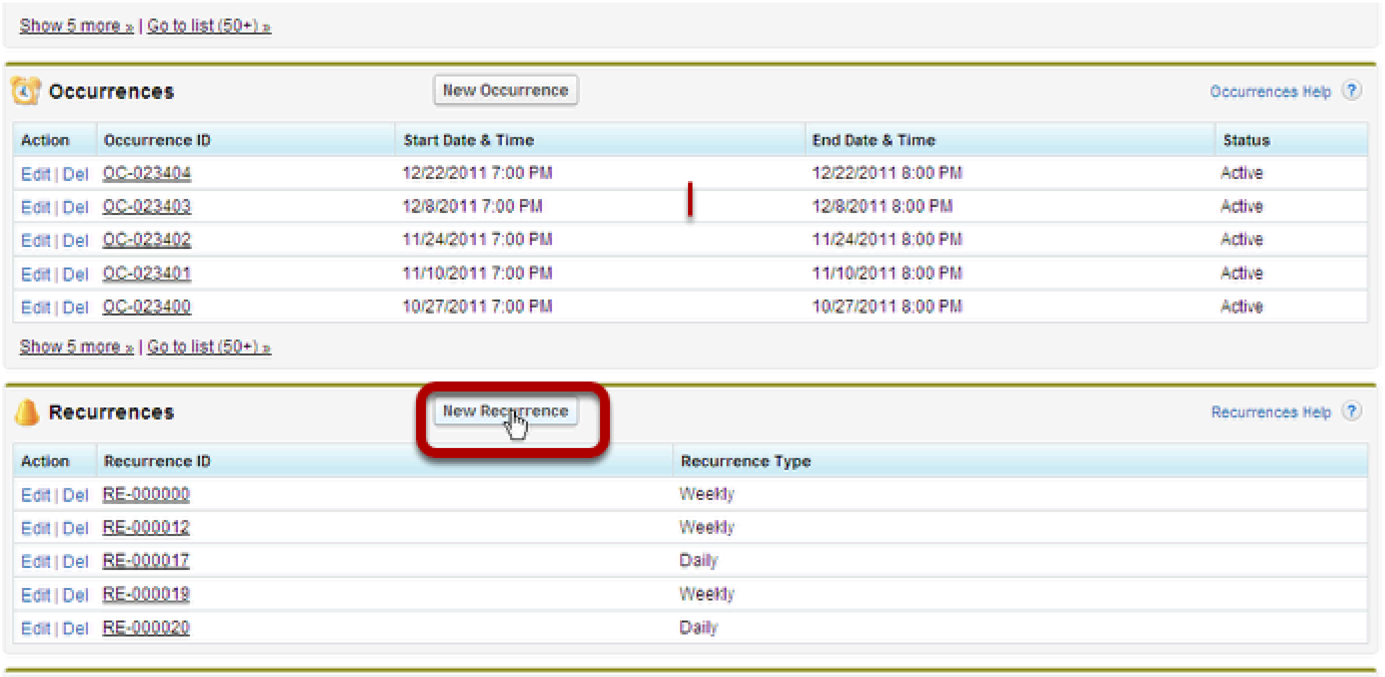
A recurrence is a regular pattern of occurrences. (The New Recurrence window is a lot easier to use than the New Occurrence window, so many times people will create a one time, one day recurrence in lieu of creating an occurrence...) REMEMBER: Recurrences happen at the same location at the same time of day, just on different days... You CAN edit the individual occurrences that this new recurrence creates, but in doing so, you lose the ability to edit them as a group.

Navigate to the Opportunity where you wish to add the Recurrence



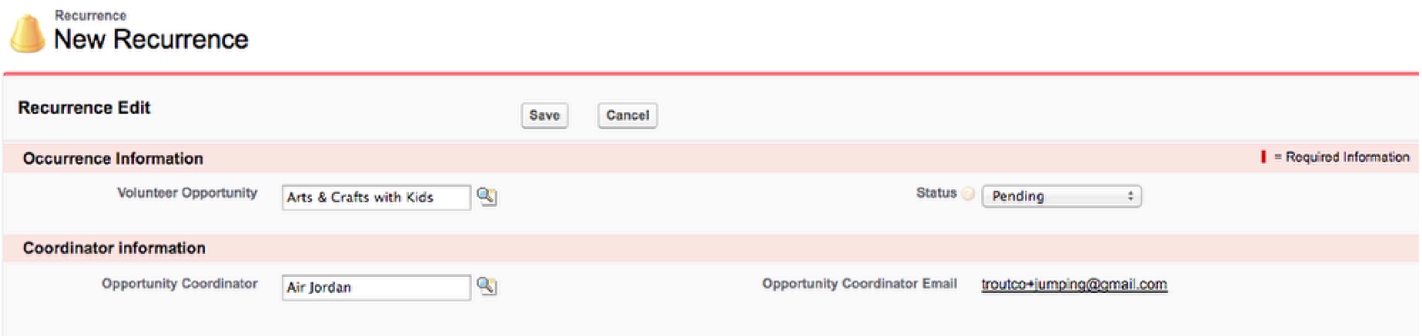
You can use the Create New Reccurrence in the Volunteer Opportunity Overview... or you can click on New Recurrence from the related list of objects

Click New Recurrence



Both options take you to the New Recurrence screen.

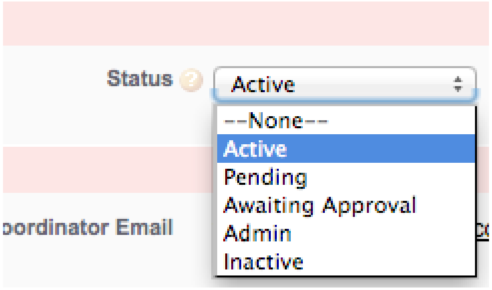
The Opportunity Name should auto-populate, since you created this from the Opportunity page



If you created a New Recurrence from Recurrence Tab, make sure to use the LookUp button so it properly links to the correct Opportunity.

The Default Opportunity Coordinator will be brought over. You can update this if desired.

Update the Status

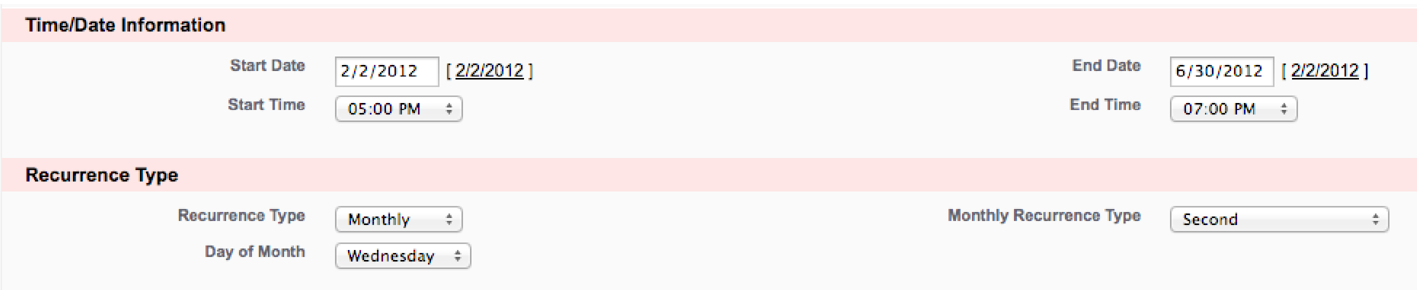


Active is ready for publishing on the Public Site.

Pending and Awaiting Approval mean they are not ready to be published and Inactive is the same as canceled and means that all occurrences associated should be removed from the site and won't be reactivated in future.

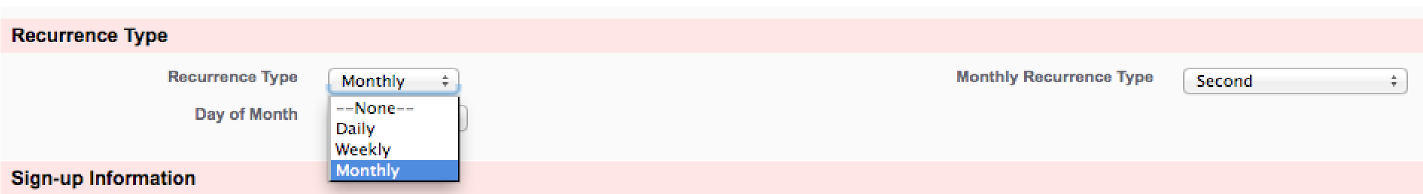
Use Pending for administratively created occurrences. Awaiting Approval is a status that indicates that it was created by the partner and awaiting you to 'publish' the recurrence and its related occurrences.

Enter the Start Date and End Date and Start Time and End Time for the series of occurrences you wish to create



NOTE: The end date cannot be later than the end date you have set up for the Opportunity. An error message will appear if you attempt this.

Set up the Type of Recurrence



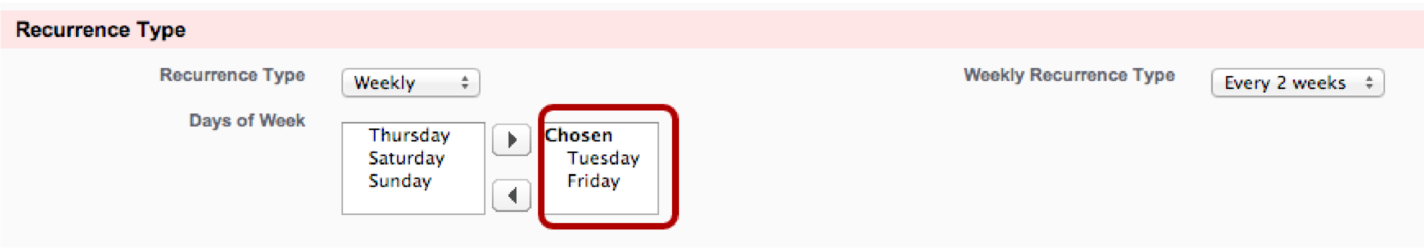
How often does this event recur? Remember, when you build each instance of the recurrence, they have to happen at the same time once a day, once a week, or once a month. You want to have 2 different times? Once the recurrence creates the series of occurrences, you can go in and edit the individual occurrences. When you do that, however, the recurrence is broken and you cannot edit them as a group anymore.

The Recurrence type can be Monthly, Weekly or Daily.

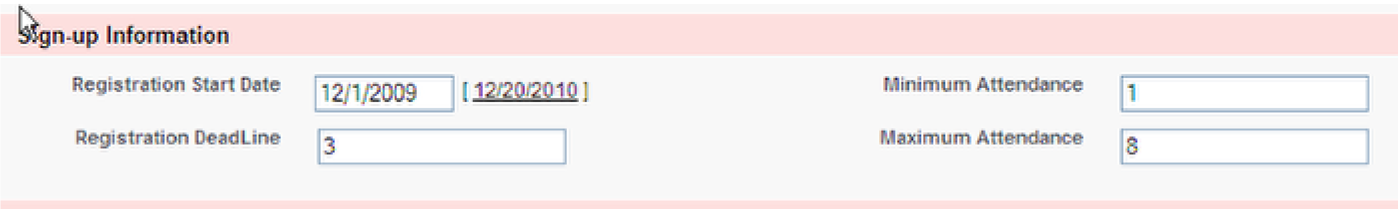
When you chose the recurrence type, you'll have two more fields to update to specify which recurring day of the month, or which day of the week, etc.

i.e. for monhtly: Second Wednesday of the month.

When picking days of the week, be sure to move the days from the 'available' column to the 'chosen' column to select them!



Set up your Sign-Up information



NOTE: If you leave these fields blank, it populates with the default information from the Opportunity.

Registration Start Date: When would you like people to open the registration for this recurrence? In this case, registration starts on 12/1/2009

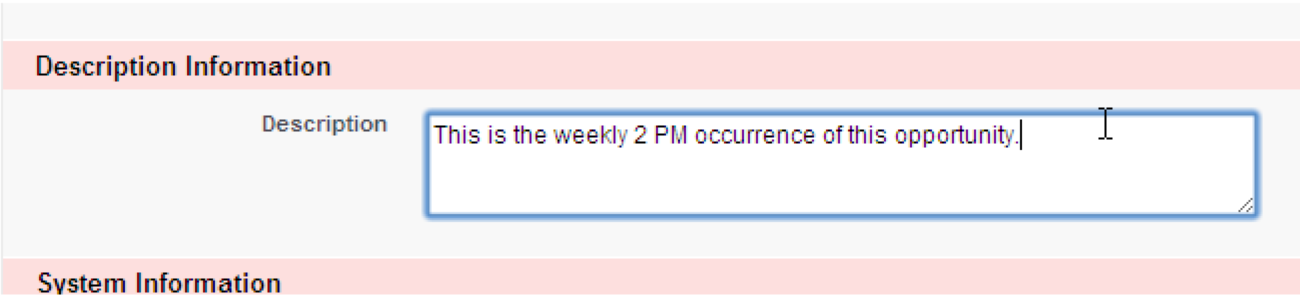
Registration Deadline: How many hours before the start of this occurrence is registration turned off? In this case, 2 hours.

Set up your Location

This field is auto-populated with the default location. You can lookup a different location if you choose.

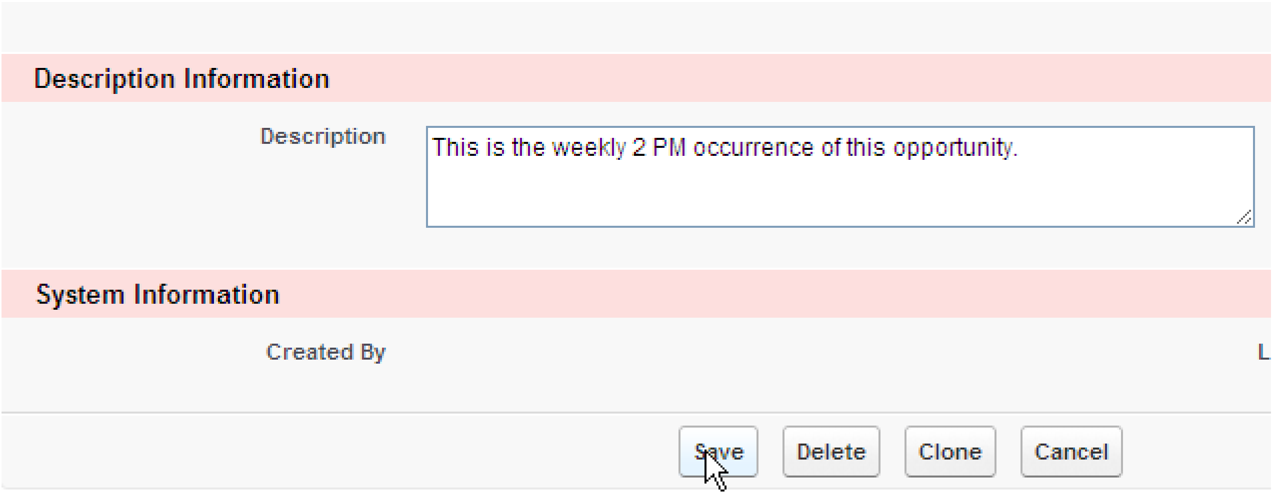
If each recurrence is happening in a different location each time, you need separate recurrences (or to update individual occurrences)

You can choose to input a Description



This is an internal field where you can put notes on the nature of the occurrence.

Click Save



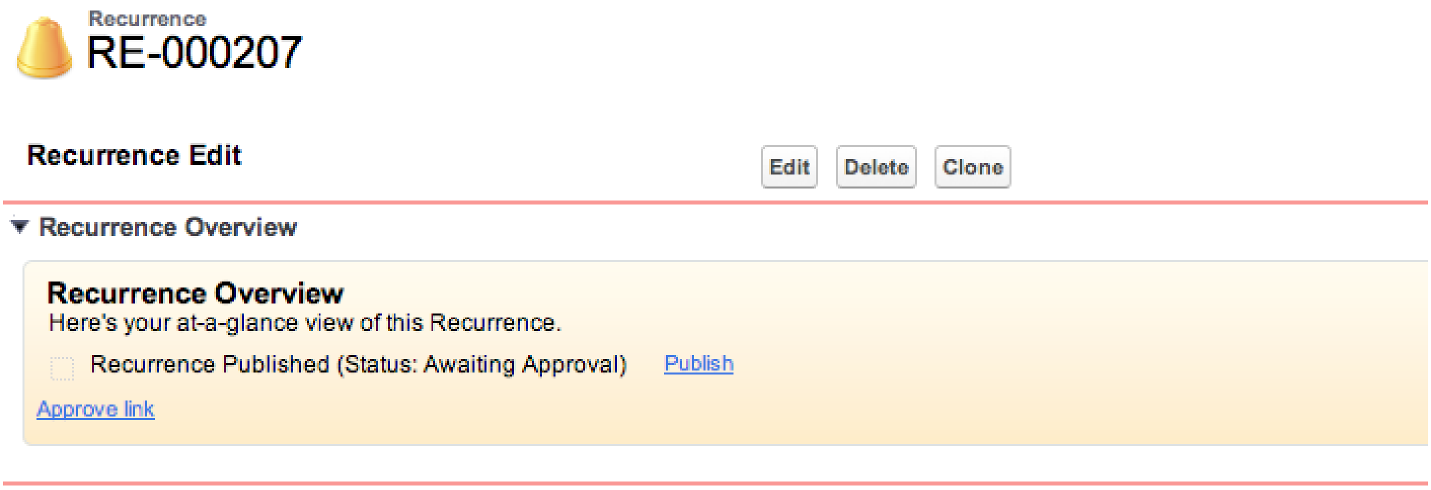
You have created a recurrence. You will be taken to the Recurrence page. Confirm all the information and look to see that it has the related field: Occurrences at the correct Start and End DateTime.

You will also see that a number of occurrences have been created.

NOTE: Best practice in creating recurrences is to NOT create occurrences too far into the future. Things change. And you'll want to update a lot of the occurrences you originally created. This gets harder to manage the more occurrences are involved.

There is a system limit that prevents you from creating more than 52 occurrences with one recurrence.

If the recurrence is created by a partner, it will be sent to you to approve, which you do clicking on the Publish Link in the saved recurrence record.



NOTE: You cannot have more than 58 upcoming, active occurrences at one time.

Do not have more than 58 occurrences that are on future dates and in active status. The limit for displaying active occurrences in the volunteer opportunity detail page is 58. Exceeding this number will cause an 'authorization required' error page to appear.

Making changes to recurrences, occurrences, and opportunities

Canceling or Rescheduling date and time specific Occurrences

It's not unusual in the day to day business of managing volunteer opportunities to need to cancel or reschedule an occurrence for a date and time specific opportunity.   (Note: one never 'cancels' an individually scheduled opportunityas they only have one occurrence that is tracking multiple dates, past and future. See below for info on how to manage Individually Scheduled Opportunities.)

Canceling a date and time specific occurrence requires thinking through two separate processes:

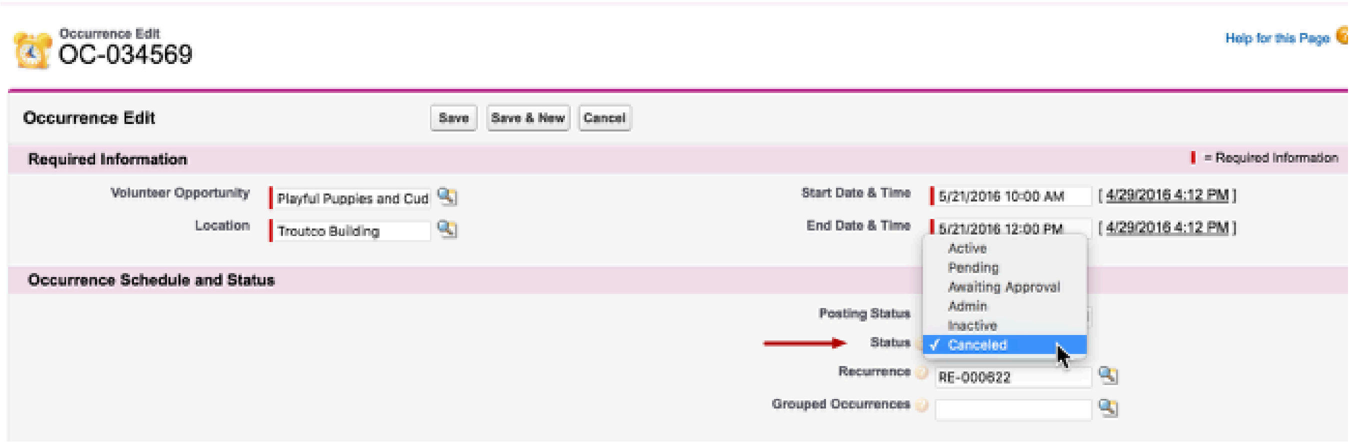
1) Canceling the original occurrence itself so that no one else signs up for it, and it is no longer available for signup on the public site.

2) Deciding what to do about any volunteers who are already signed up: "existing connections"

NOTE: Keep in mind the following:

- Making a **volunteer opportunity** inactive will result in ALL occurrences being no longer visible on the public web site. Sign-ups will no longer be possible.
- Making a single **occurrence** cancelled (or inactive) will result in that occurrence being no longer visible on the public web site. Sign-ups will no longer be possible. But canceling is preferable to making a date and time specific occurrence inactive - as it will notify any volunteers who may have already signed up!

Canceling an Existing Date & Time Specific Occurrence



To 'cancel' an occurrence -- just change its status to "Canceled". That will result in the occurrence being removed from search and the public calendar. No additional volunteers will be able to sign up. Volunteers signed up for this occurrence will receive an email notifying them that the occurrence has been cancelled, and the occurrence will be removed from the 'upcoming opportunities' in their account.

How to handle Rescheduling of an occurrence (i.e. moving the occurrence to a different date or time)

Often, rather than outright canceling an occurrence -- what if you change an occurrence to a different day or time? ("We are moving this scheduled occurrence to next Saturday" -- hope you can join us.

Here is where business practice gets involved.   What do you typically do? Do you:

1. Remove the volunteers from the 'old date' and send them a link to the new occurrence date so they can sign up for the new date if they wish?, or do you
2. Assume everyone WANTS to be signed up for the new date and time and just move the sign-ups to a date that the volunteer didn't originally agree upon?

Here's suggestions for handling both variations:

Variation 1: Change the date and notify volunteers of the opportunity to sign up for the newly rescheduled occurrence

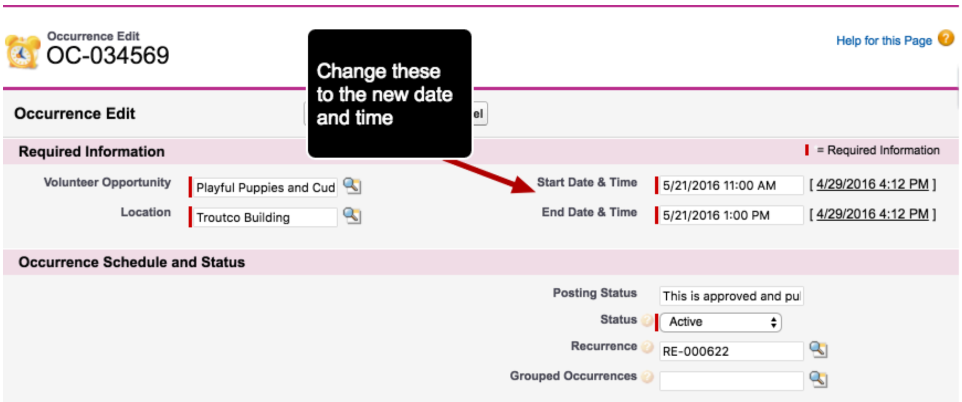
1. Create a NEW occurrence on the new date and time -- make it active.   No one is connected to this new occurrence, yet.

2. Update the original occurrence as status = cancelled. This will remove them from their old connections and cancel email alerts, and update their member account.

3. Email the volunteers and notify them the original date/time has been changed, and you've removed their original sign-up.   Give them the URL of the new occurrence so they can 'connect' to it if they want to volunteer on the new date and time

We personally prefer this approach - as it preserves a record of the PRIOR cancelled connections - as well as a record of the new occurrence and its connections. It also doesn't fill slots by people who may not attend at the new date.

Variation 2 : Change the date and assume that the existing volunteers will want to stay connected on the new date



In the occurrence record change the start date and time and the end date and time.   Click Save.

When you do this, the system will automatically send an email to all connected volunteers letting them know their has been a change to the date and time of the occurrence and to log into their account for updated info about this volunteer opportunity, it will also update their connections and reset when reminder notifications and thank you notifications are sent out!

For Individually Scheduled Occurrences you don't "cancel" the occurrence. Doing this would cancel all the connections associated with it and you'd lose the hours already logged for those volunteers in the past.

If you wish to have an Individually Scheduled Opportunity no longer visible on the calendar -- don't cancel it or make it inactive. Simply edit its one occurrence, and change the end date of the occurrence to yesterday! This will remove it from search and no one will be able to sign up for any additional connections.

How to remove an "Individually Scheduled" (ISO) Opportunity from search

Unlike Date and Time Specific occurrences, there is only one occurrence record used to track all connections to "Individually Scheduled" opportunities. So we don't cancel the occurrence. We just want to prevent further signups and remove it from search.

You don't want to cancel an ISO occurrence, as it would affect all connections that have already been confirmed and scheduled. You would also lose the hours you previously logged for connections to this opportunity.

To remove an ISO from the public site you have two options:

1) Set the end date of the occurrence to yesterday. This will prevent anyone else from signing up, and you'll also have a record of what time period people were able to schedule themselves for. It will remove the opportunity from search in 10-15 minutes.

2) If you like, you can set the occurrence and/or the Volunteer Opportunity to inactive. This too will remove the opportunity from search.

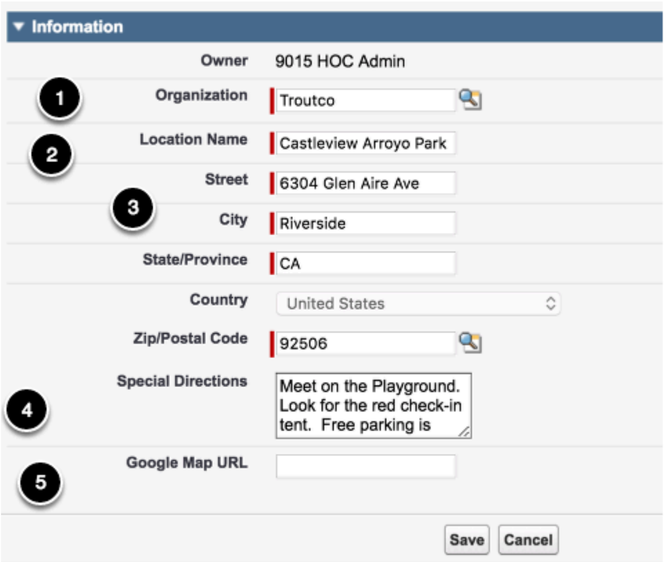
Method 1 above has the advantage of letting you know the time period (start date - end date) that the opportunity was available for people to express interest in.

Locations

Locations

Locations are usually created as part of the process of creating Volunteer Opportunities by using the Volunteer Opportunity Wizard,   However, they can be created directly in Salesforce by clicking on the NEW button in the Locations Tab.

Locations are addresses that are specific to Volunteer Opportunities and related to the organization that use them.



To create a new location:

1) Organization is a required field. This will associate this location with the organization who uses it for their volunteer opportunities and be one of the locations they can look up and reuse in future.

2) Give the location a recognizable name that describes the building or location. (examples "YMCA Building, Room 233" or "Union Rescue Mission Warehouse"

3) Fill in the Street, City, State and Zip.   Zip is required and must be looked up (its associated with a zip code table built into HandsOn Connect and regularly updated)

4) Special directions are optional and can be used for anything, but primarily its intended for:

• Driving Directions

ª Parking information

ª Transit Information

ª Anything else you want to keep track of about THIS location.

All this information will be made available to volunteers AFTER they have signed up and been confirmed for an opportunity via a link in their confirmation email (See below)

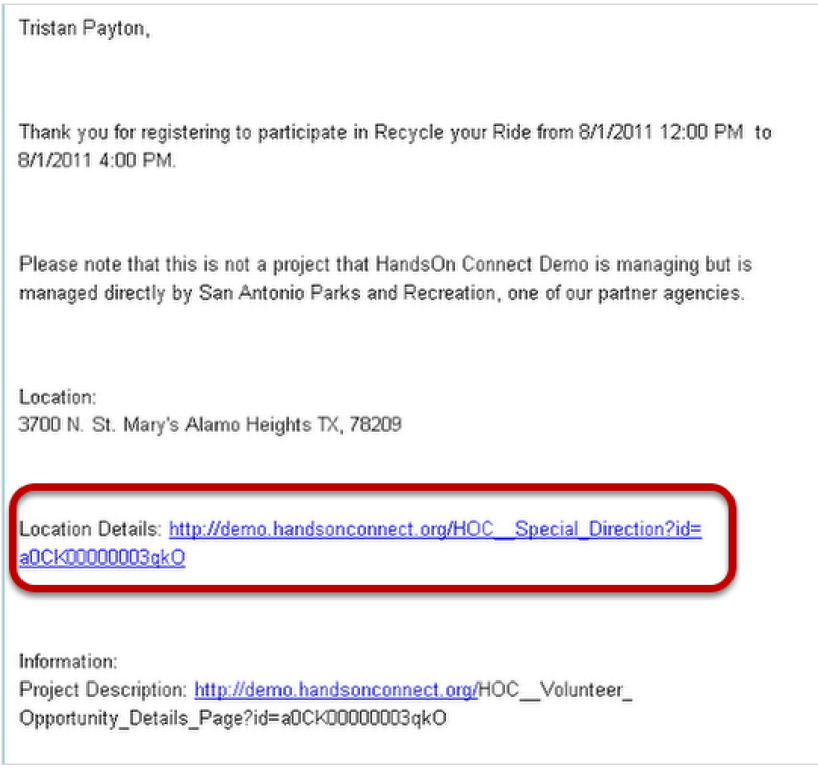
5) **Do NOT fill in the Google Map URL**. This will be calculated for you automatically when you save the Record.

Once a location has been saved you can:

• Click on the Google Map URL that has been generated and see the location on a map. (This URL is also sent out in emails to volunteers)

• See associated opportunities and occurrences that take place at this location

An email is sent to volunteers when they sign up for an opportunity that includes a link to the location information on the public site.



Tristan Payton,

Thank you for registering to participate in Recycle your Ride from 8/1/2011 12:00 PM to 8/1/2011 4:00 PM.

Please note that this is not a project that HandsOn Connect Demo is managing but is managed directly by San Antonio Parks and Recreation, one of our partner agencies.

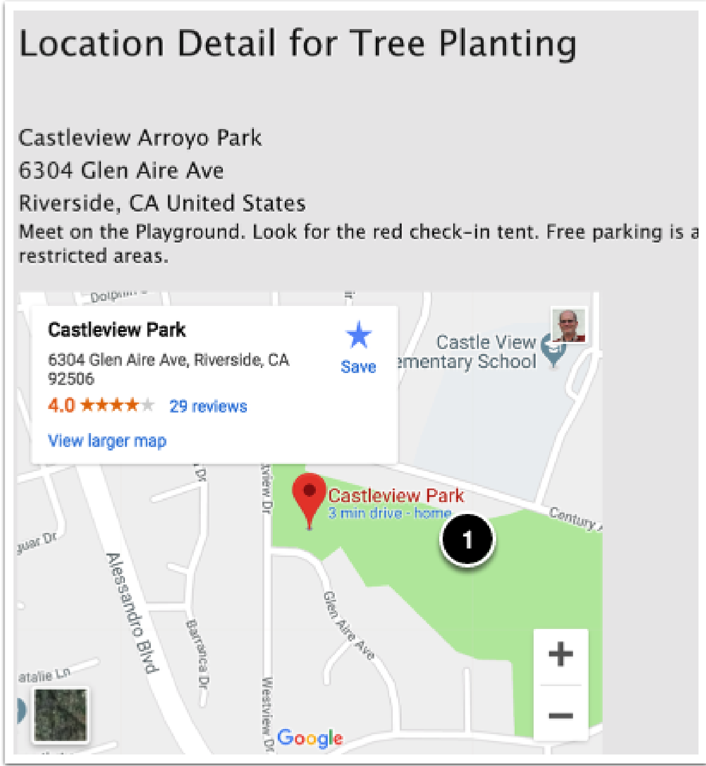
Location:
3700 N. St. Mary's Alamo Heights TX, 78209

Location Details: http://demo.handsonconnect.org/HOC__Special_Direction?id=a0CK00000003qkO

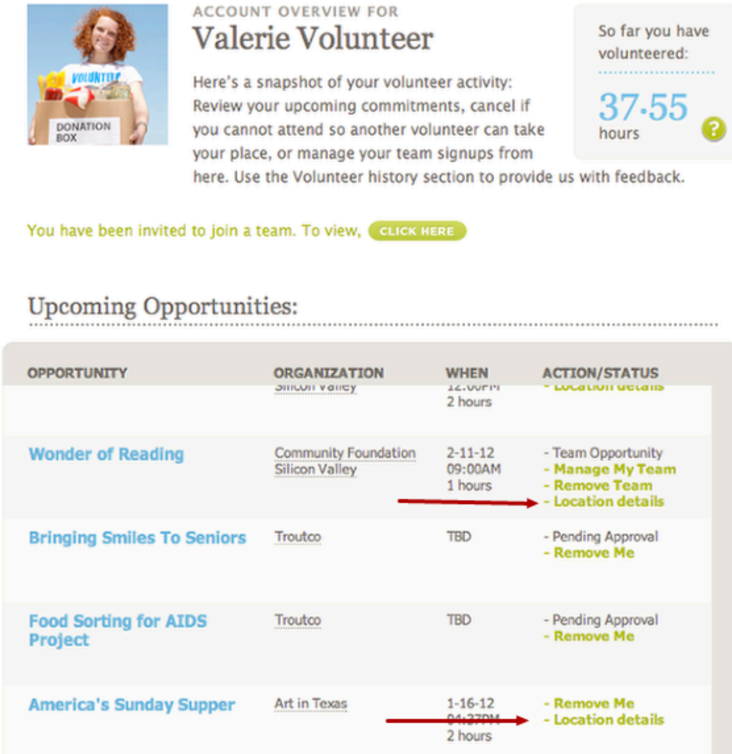
Information:
Project Description: http://demo.handsonconnect.org/HOC__Volunteer_Opportunity_Details_Page?id=a0CK00000003qkO

The link in the email takes them to the Location Details page which will include the address, special instructions, and a viewable Google Map from which they can get driving, walking or transit directions:

Location Details Page



Links to Location Directions also appears in the volunteer's My Account/Upcoming Opportunities



Note for International Customers.   Since International customers do not use the U.S. Zip Code table - in non-U.S. versions of HandsOn Connect - the lookup field "Zip/Postal Code" is replaced by a text field labeled 'zip code' -- which is an optional field (not required).

Volunteer Events

What is a volunteer event?

A Volunteer event is a way to bundle a number of Volunteer Opportunities together for the purpose of marketing and reporting.

Examples: National Volunteer Week, Martin Luther King Jr. Day, or a large event like a servathon with multiple projects associated with it.

It's called a "Volunteer Event" in HandsOn Connect, to differentiate from Salesforce's own standard object "Event" which is used for scheduling appointments on the internal Salesforce Calendar.

On the public site -- **Volunteer Events** are referenced as **Special Events**

A volunteer event can be any number of opportunities, either affiliate-managed or partner managed. They are just a number of different volunteer opportunities that are taking place as part of a larger 'event'.

How a volunteer event appears on the public site calendar.

Volunteer Events show up on your calendar in their own color (see "Martin Luther King Jr Day of Service 2012" above).   Clicking on the calendar link will take you to the events page for that event.

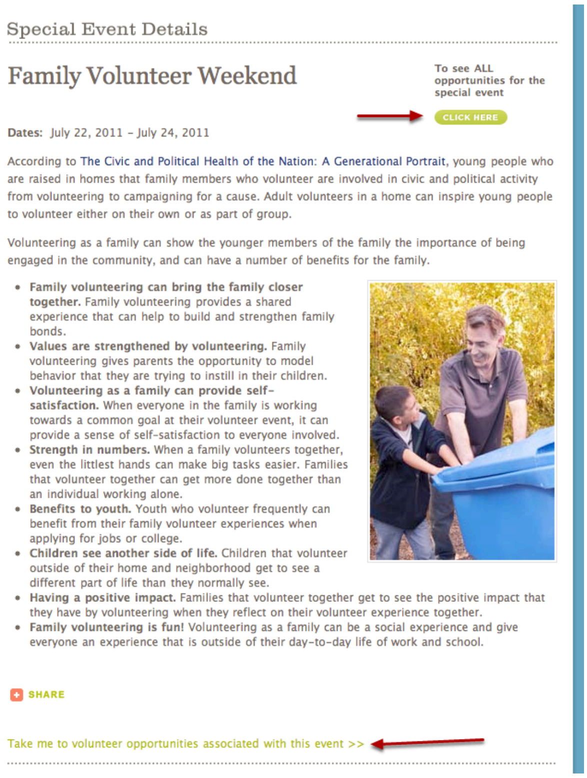
You do not sign up for events themselves. You sign up for the opportunities that are PART of the event.

Clicking on an event on the calendar will take you to a splash page for the Event. Here you can add rich content, add sponsor logos, etc and tell people about the event.

All the Volunteer Opportunities that take place as PART of that event are not listed on the calendar -- only the event itself.

The Special Event only shows up on the calendar on the specific days during the event where a date and time specific opportunity is listed. (Individually Scheduled Opportunities that are part of a special event will NOT cause the special event to show up on the calendar, because ISOs never appear on the calendar, only on search pages.)

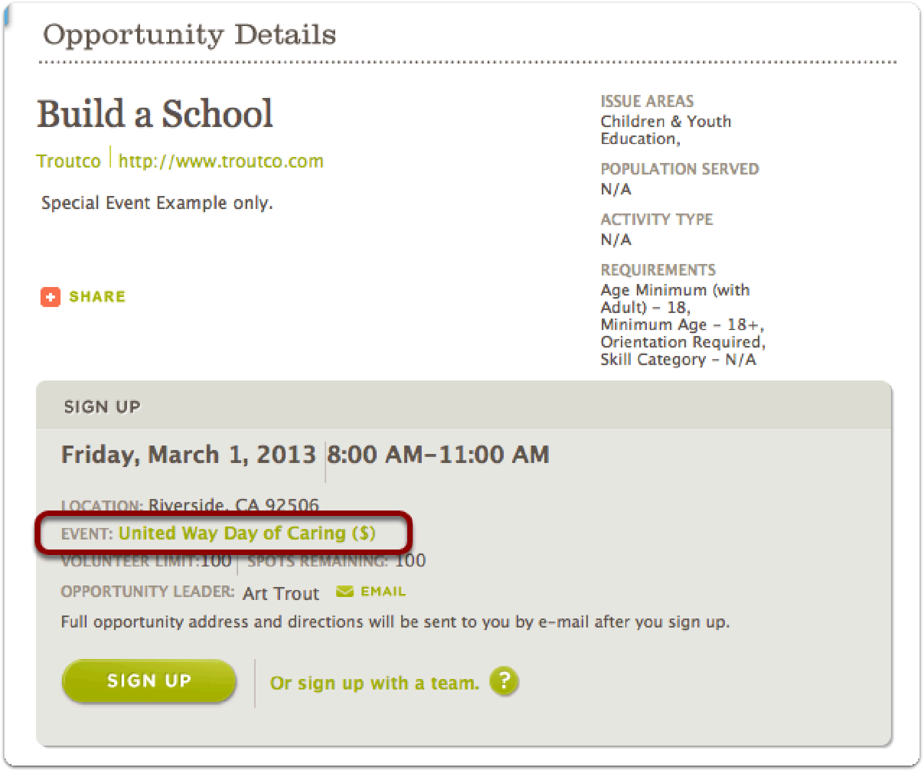
Splash Page for an Event



The Special Event Detail Page has links to a list of all the Opportunities associated with that event.

Clicking on either of these links will take you to the SEARCH page which has the complete list of all the volunteer opportunities associated with this special event.

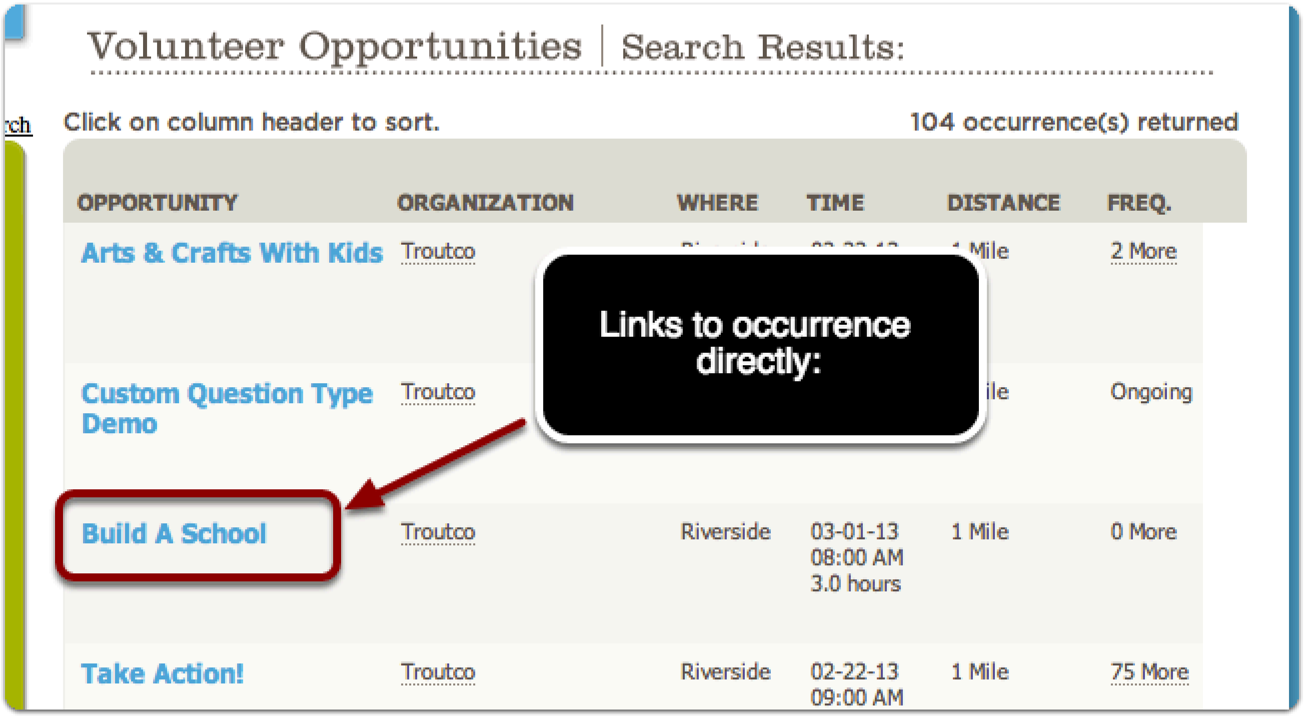
How do events get reflected in a Volunteer Opportunity Description?



Any opportunity, that is associated with a Volunteer Event - has the Event name appear on the opportunity detail page. The event name is a link to the event splash poge.

What are the behaviors of opportunities and special events in the various search modes?

On the **Search** page -- All opportunities that are part of a special event appear in search results. Special Events themselves DO NOT appear in the search results.



On the **Calendar** page - The name of the Special Event appears on the calendar, which links to the Event splash page. The opportunities that are PART of the special event, do not get listed in the calendar view. (This prevents the limited space available in the calendar view from being dominated by all the opportunities in the special event.)

The name of the event ONLY appears on the calendar on days where there is a date and time specific occurrence, occurring on that day. (This gives you the flexibility to have event-related opportunities that span a longer period of time without cluttering up the calendar or confusing volunteers.)

(Note: Individually Scheduled OPpportunities that are associated with a special event, will not cause the event to appear on the calendar, unless there are date and time specific occurrences that day as well).

When to create a special event - and when not to:

Create a special event record:

- If you want high visibility for the EVENT itself, pushing more people to the SPLASH page for the event, before going to the opportunities. (Great for setting context, displaying sponsor ads, etc.)
- To cut down clutter on the monthly calendar page.
- If you want the monthly calendar to direct people to the splash page - rather than to the individual opportunities.

Don't create a special event record:

- If you don't want people to have to view a splash page about the event itself.
- If you want individual opportunities to all appear in the calendar view -- instead of the link to the event splash page.
- If you want to emphasize individual opportunities more than the event itself, (An alternative way of branding opportunities as part of a special day is to put the name of the 'event' in the opportunity title itself, rather than creating a special event record. .. (i.e. MLK Day 2013 - Paint a School). You can have an 'event' and not create a special event object. This puts the emphasis on the opportunities, instead of the 'event' if it needs no special splash page.

Best Practice: Create a special event object when you want to highlight a splash page. Don't create a special event object if you don't want people to read an extra page and instead get more directly connected to the opportunities themselves.

Who can create volunteer events?

Only fully licensed Salesforce users (whether System Administrators or Staff) can create Volunteer Events and associate volunteer opportunities with them.

By default - associating Volunteer Opportunities to special events are not enabled in the partner portal -- but a field allowing a partner to associate an opportunity with an existing Volunteer Event can be enabled for the sharing portal. (Open a help ticket to request adding this field to your partner portal is you want partners to be able to associate their opportunities with the events you have created)

Tips: Want easier access to individual occurrences when using "Special Event" splash pages?

Some users choose to manually embed direct links to volunteer opportunities that are part of an event in the splash page of that event. It's a bit of work to do so, but an option if you want to USE a splash page -- but give people a more direct way to get to the individual occurrences themselves (See example above)

Creating a Volunteer event

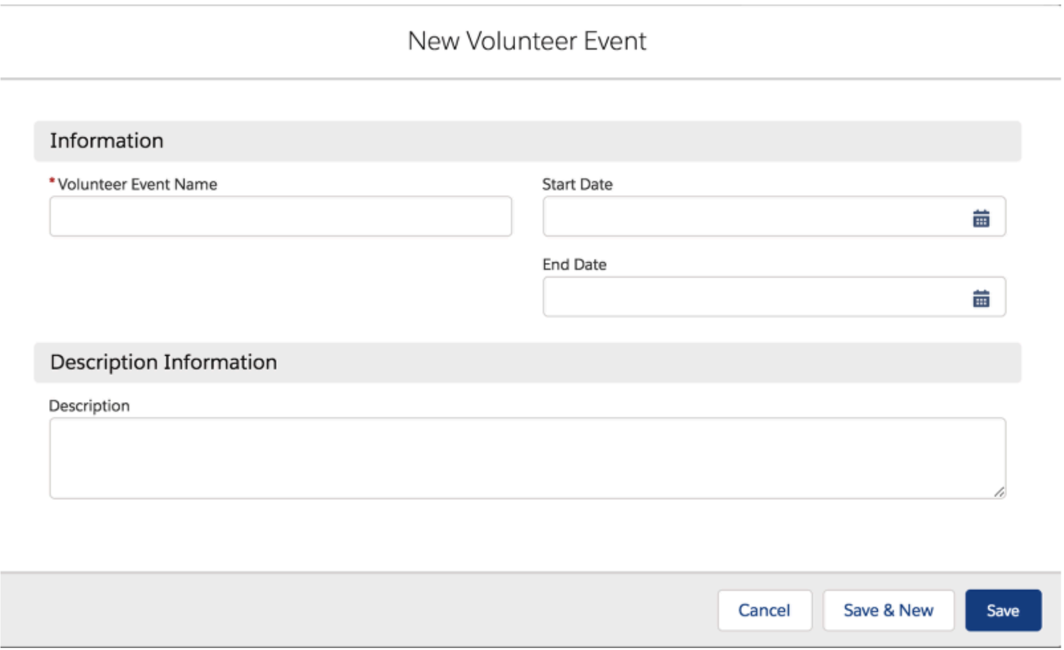
Creating a Volunteer event

Click on NEW on the Event object homepage and then fill out the following:

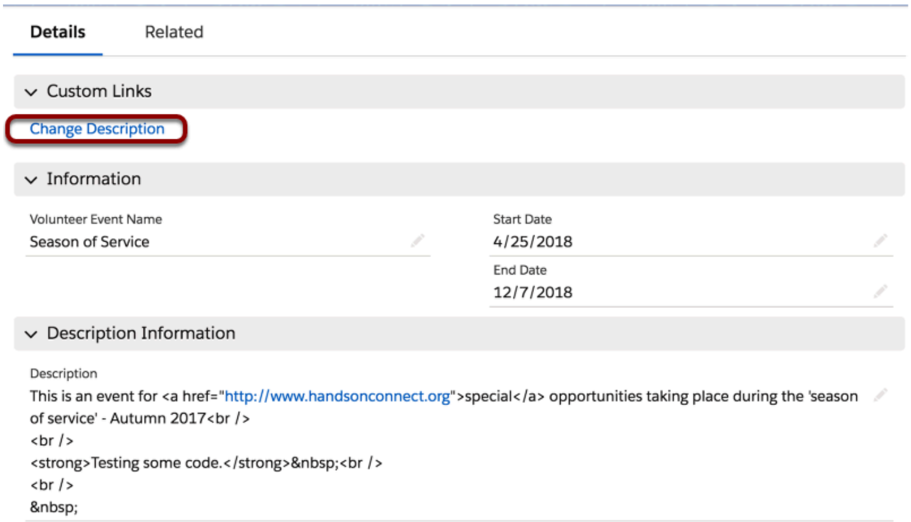
1) Give the event a name

2) An event must have a start date and end date

3) Give the event a description.   (Initially you'll enter it in text form only, but you can edit it with HTML text once the record is saved.



Updating and Managing the Volunteer Event



Once saved, you'll see the full Volunteer Event record and its related lists.

To add rich content, images, etc to the opportunity description, click on the "Change Description" link in the Custom Links section. (In the example above we've already used the editor, and so now the description appears with the underlying html visible).

All Volunteer Opportunities that are associated with the event will appear in the related list "Volunteer Opportunities"

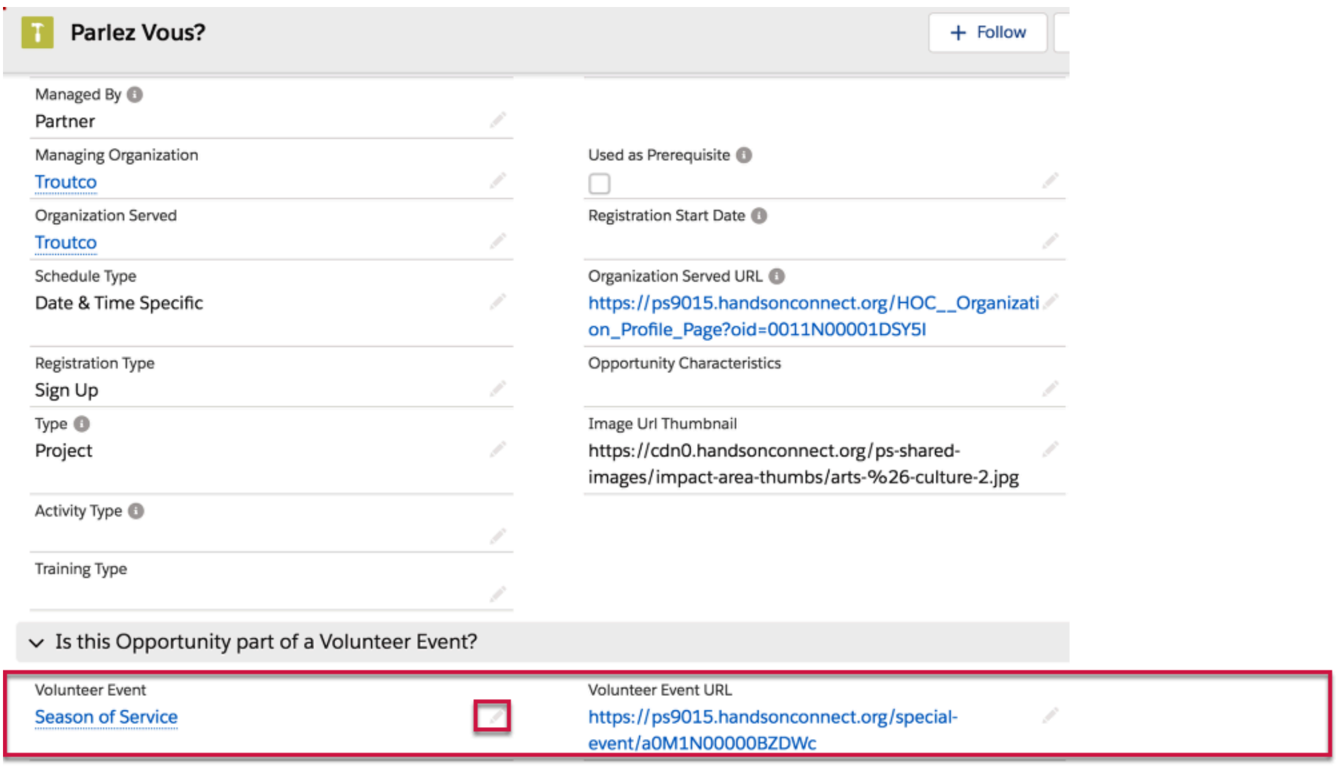
How to associate a Volunteer Opportunity with a Volunteer Event

While you could create a volunteer opportunity for an event from its related list, this is the hard way. Instead use the volunteer opportunity wizard to create a volunteer opportunity that will take place during your event, and THEN associate it with the event.

First Use the Volunteer Opportunity Wizard to create a volunteer opportunity

See [Working with Volunteer Opportunities]() for full instructions on creating volunteer opportunities.

Associate your opportunity to the event in the Special Event Information section of the opportunity record.



Edit the Volunteer Opportunity field "Volunteer Event" and use the lookup to select one of your existing volunteer events.   Once you select the appropriate event -- the opportunity will become part of that event and be linked to it on the public site. **Please note that the dates for any volunteer opportunities that you associate with a volunteer event should fall within the start date and end date specified for the volunteer event.

The field "Volunteer Event URL" will be automatically filled in for you when you save the record. This will give you a link directly to the event page on the public site.

(Optional) Advanced Volunteer Opportunity Management Features

HandsOnConnect Cloud Solutions

Grouped Occurrences

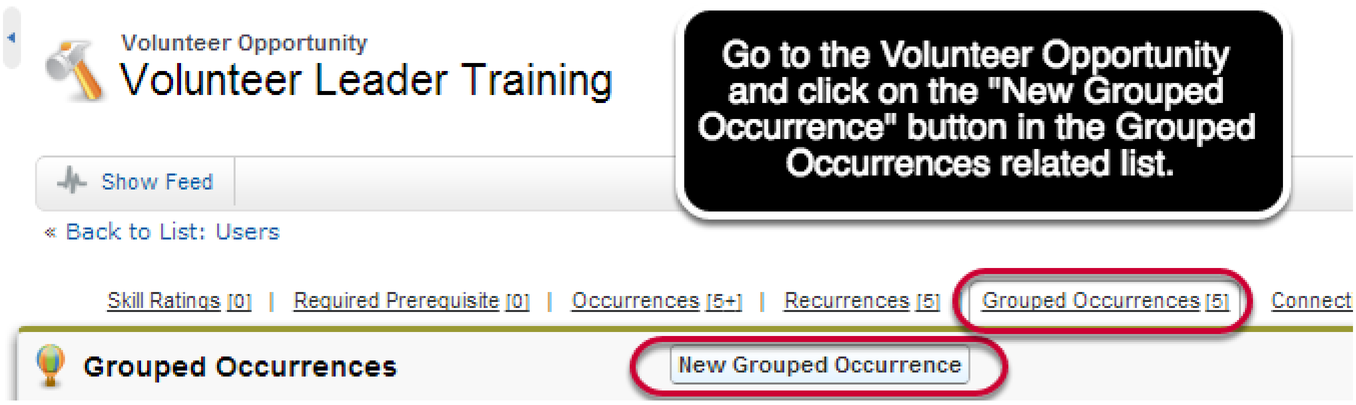
The features in this chapter are pretty powerful tools and create multiple connections at once. So remember "With great powers come great responsibility" and train users how to properly use these features. These features are not enabled by default in HandsOn Connect - but require the System Administrator to enable them. Instructions for enabling these features can be found in the [Advanced System Administrators Guide.]()

Only enable advanced features when you have a specific business need to use these advanced functionalities - and enable them only for profiles that have been trained to use them. (You can enable them for System Administrators only if desired).

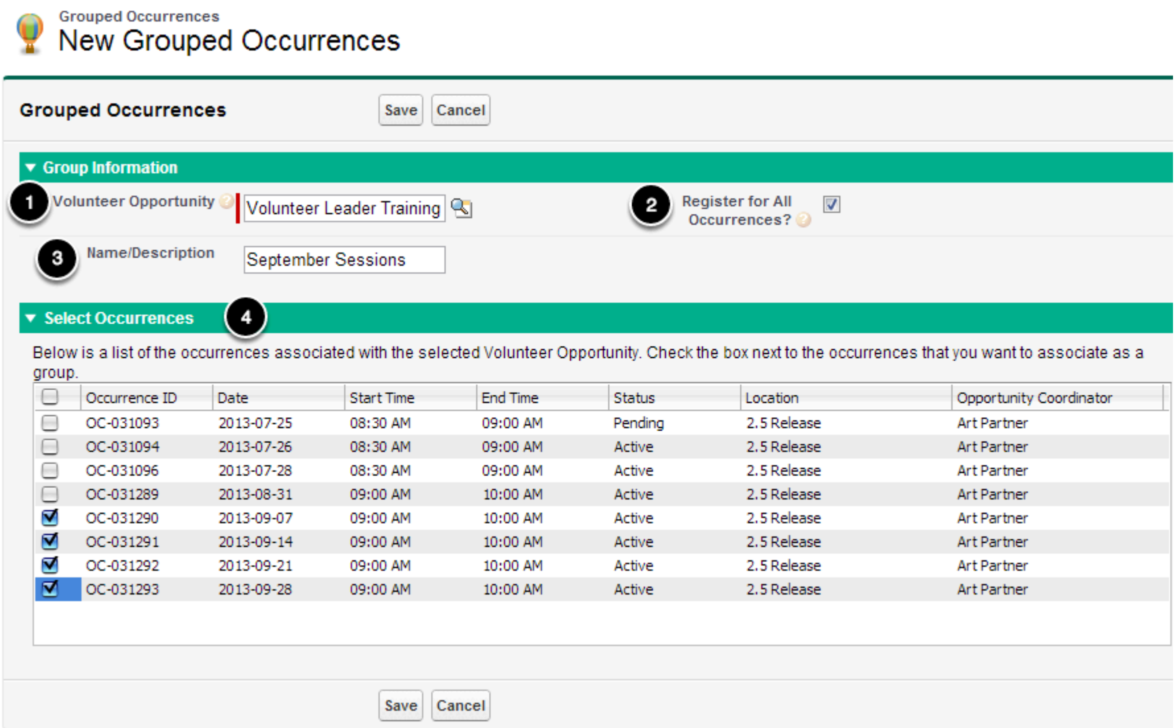
Grouped Occurrences allow users to have volunteers sign up or express interest in a series of occurrences as in one step. They can only be associated with Date & Time Specific volunteer opportunities and all the occurrences in the group must be associated with a single volunteer opportunity.

The ability to group occurrences can be made available to system admin and staff users. It is not a feature that can be enabled in the sharing portal. [Click here for details on how to enable grouped occurrences in your instance of HandsOn Connect.]()

Creating a Grouped Occurrence



In Lightning, you'll find it here:



On the Grouped Occurrence page, you have the following options:

1) Volunteer Opportunity - Will be pre-populated with the name of the opportunity you came from.

2) Register for All Occurrences? - When checked, volunteers MUST sign up for all the occurrences in the group. Once the first occurrence has past, then all the other occurrences will be removed from the Opportunity Detail page and no longer allow volunteers to register for the series. (Note: the occurrences will still appear on the Opportunity Calendar, they are only removed from the opportunity detail page.)

3) Name/Description - This is an optional text field to allow you to define the grouping in case you have multiple grouped occurrences with a single volunteer opportunity.

4) Select Occurrences - Occurrences can only be part of 1 grouped occurrence series. The chart that is displayed shows all the occurrences associated with the selected Volunteer Opportunity. Column headers can be clicked to resort the occurrences based on any of the columns in case you want to group them based on location or opportunity coordinator.

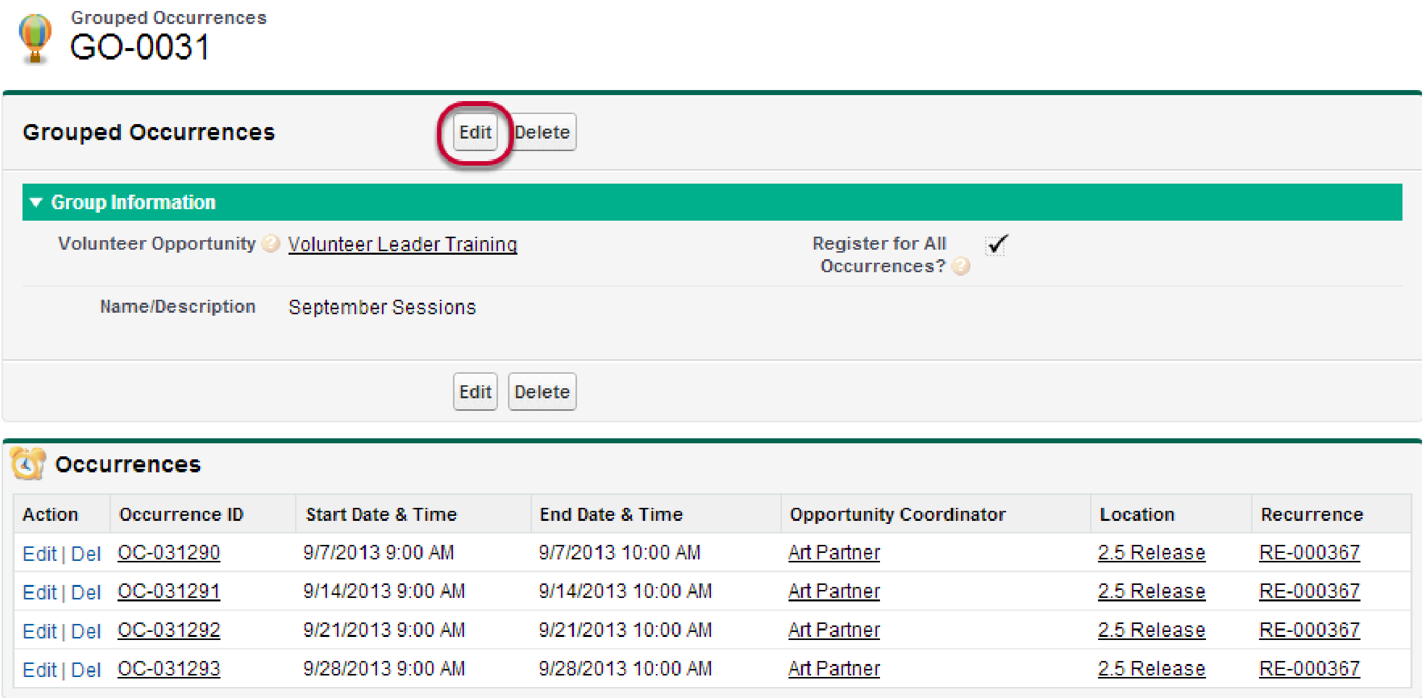
You must select at least 2 occurrences to create a grouped occurrence record.

Once you have selected the Occurrences and other fields, click Save.

Important Note: Do not group more than 20 occurrences in one group. A group of more than 20 occurrences may fail to accept signups on the public site due to Salesforce Limitations on the number of actions that can take place in SF at one time.

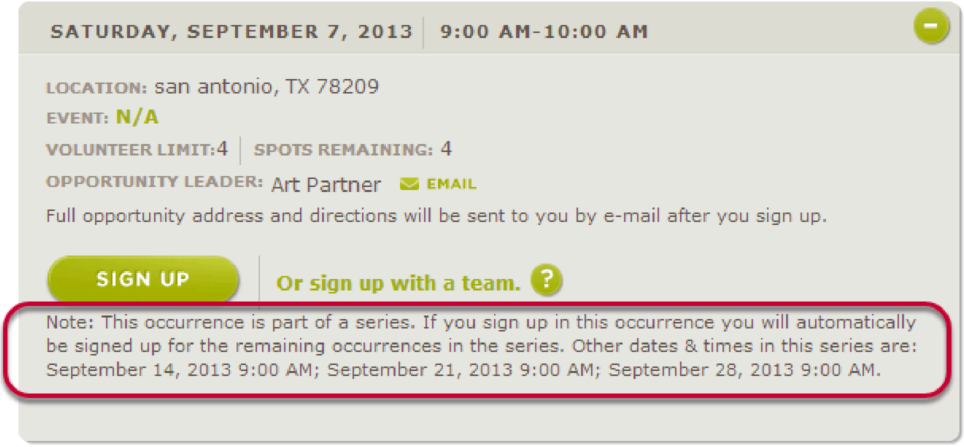
As a matter of best practices, its unlikely that it makes sense to require a volunteer to sign up for more than 20 occurrences at a time. Their plans are likely to change and then they would have to remove themselves from many of the occurrences they previously signed up for.

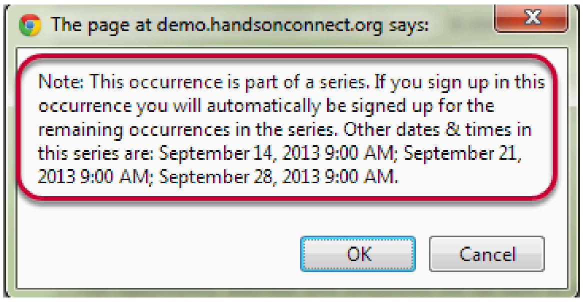
Grouped Occurrence Record



Once created the Grouped Occurrence record has a related list of the occurrences in the group. You can also Edit the grouped occurrence to remove or add occurrences, change the description, or "Register for All Occurrences?" checkbox.

Grouped Occurrences on the Public Site (Register for All Occurrences? = Unchecked)



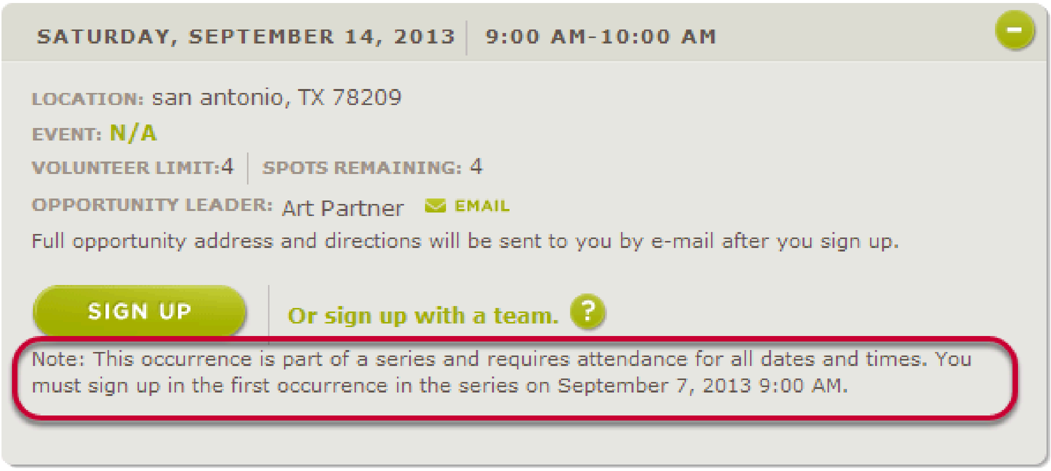


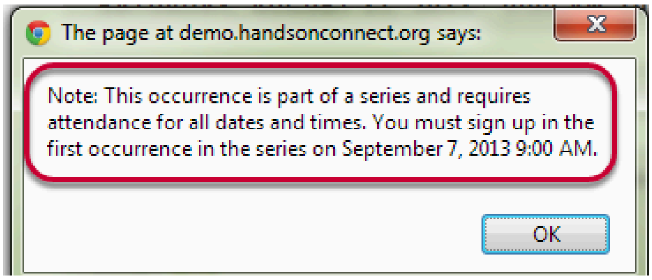
Occurrences that are part of a Grouped Occurrence have a **NOTE** added to the Sign up/ Express Interest box as well as a pop-up message letting the volunteer know that they are registering for a series and all the dates of the series.

When Register for All Occurrences? is unchecked then the same note appears for all the occurrences in the series with the dates that are remaining.

For example in the image above, the series is September 7, 14, 21, and 28. If a volunteer were to click on the September 21 occurrence to sign up they would be signing up for the 21 & 28, but not the 7 & 14 since those take place prior to the first occurrence of which they were registering and registering for all is not required.

Grouped Occurrences on the Public Site (Register for All Occurrences? = Checked)





When Register for All Occurrences? is checked, then volunteers are only able to sign-up for the entire series. Occurrences that are part of the series, but not the first have a **NOTE** letting the volunteer that they must sign up for the first occurrence in the series and provides them the date. A pop-up message also appears in case they don't see the Note.

Be aware that its possible for someone to remove themselves from one or more occurrences after they have been signed up for the entire group. This creates the following possible concern:

1) If one or more occurrences in the group have available space, then another volunteer will be able to sign up for the entire group (unless you are requiring sign-up for ALL occurrences and the first occurrence date has past). Signing up for the one occurrence that has space, will still connect the volunteer to all the remaining occurrences in the group, Even if they are full! The rules you've established for the occurrence group takes precedence OVER the maximum attendance limit.

2) If you do not wish to exceed the maximum attendance for forthcoming occurrences that are part of the group - you should remove the one occurrence that has available

space from the group - so that the one occurrence with available space is the only one a volunteer will be signed up for.

Enabling Grouped Occurrences

System Admins that wish to enable this functionality can follow the steps at this link.

Prerequisite Opportunities

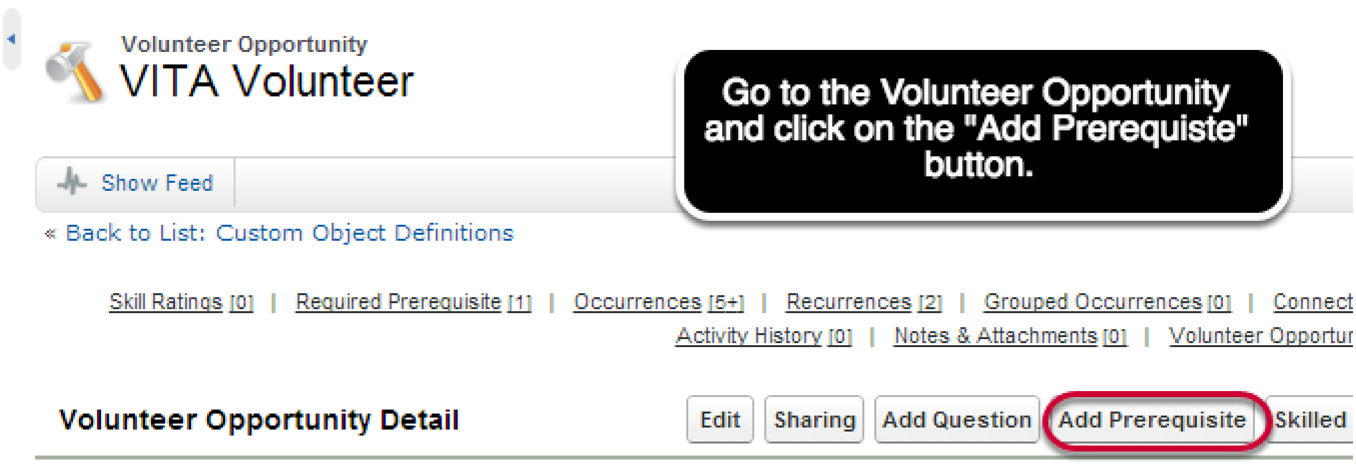
A Prerequisite Opportunity is one that a volunteer is REQUIRED to sign up for in order to signup or express interest for another opportunity. (Example: You require volunteers for a painting project to also attend the prerequisite 'painting training' opportunity. They will be unable to sign up for the opportunity unless they also signup or express interest in the training OR have attended that prerequisite in the past.

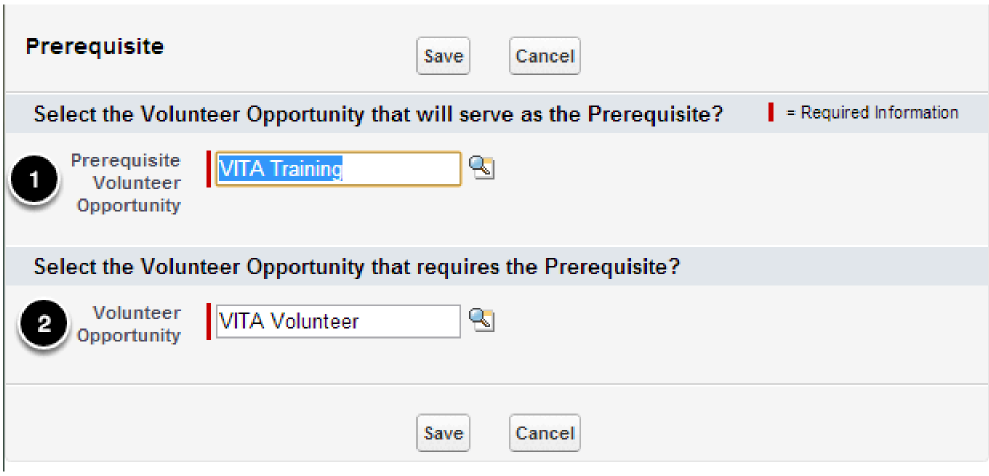
When a volunteer signs up or expresses interest in an opportunity that has a prerequisite, they will be also automatically be directed to signup or express interest in an occurrence the prerequisite opportunity.

NOTE: A prerequisite opportunity must be date and time specific and have at least one occurrence available that takes place before the opportunity that requires the prerequisite. An Individually Scheduled Opportunity cannot be used as a prerequisite.

NOTE: Because of the complexities of team signups, prerequisites are not compatible with the team signup process. If an opportunity requires a prerequisite, and a volunteer signs up as part of a team, they will NOT be automatically redirected to signup for the prerequisite opportunity as well. We recommend that you turn off team signup for any occurrences that are part of a volunteer opportunity that requires a prerequisite. See this link to enable the functionality to "turn off team" if it is not present in your occurrence records. Alternately - you can monitor when a team captain makes a connection - and contact them, telling them they need to sign up each team member for the prerequisite opportunity as well.

Creating a Prerequisite





On the Prerequiste page, you have the following options:

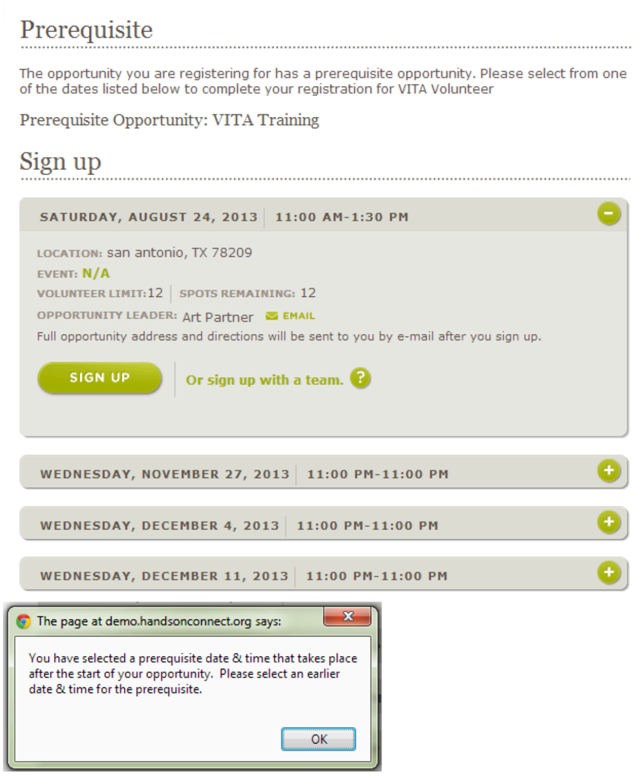
1) Prerequisite Volunteer Opportunity - Use the lookup to search for the Volunteer Opportunity that you would like to require as the prerequisite.

2) Volunteer Opportunity - This will be pre-populated with the volunteer opportunity you were on when you clicked on the Add Prerequisite button.

Once you have selected the Prerequisite Volunteer Opportunity, click Save.

Prerequisites on the Public Site

When a volunteer clicks sign up or express interest and the volunteer opportunity has a prerequisite associated with it, the volunteer will be taken to the Volunteer Opportunity Questions, if any, and then automatically taken to the Prerequisite Detail Page to sign up or express interest in the prerequisite.

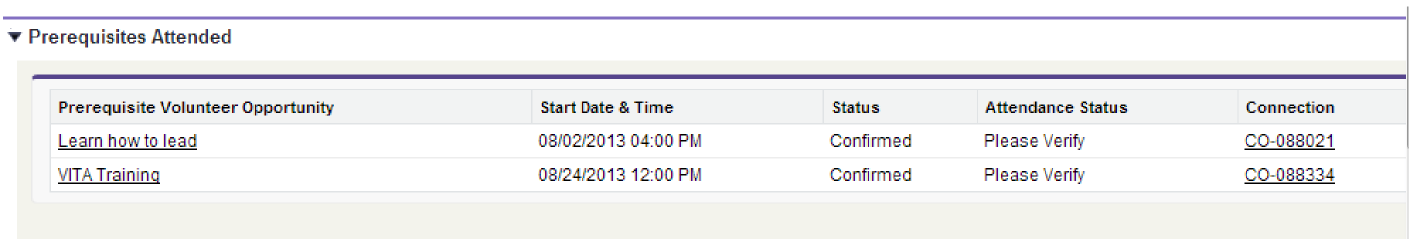


The prerequisite page displays all the available occurrences. If a volunteer tries to select an prerequisite occurrence for a date & time which takes place after the occurrence they initially signed up for they will be presented with a pop-up to select an earlier occurrence.

If the Volunteer already has a connection associated with the Prerequisite Volunteer Opportunity in Status = Confirmed or Pending Approval, and the Attendance Status is NOT equal to "Not Attended," "Canceled," or "Declined" then the prerequisite page will NOT appear since the volunteer has already made arrangements to complete the prerequisite.

NOTE: If the prerequisite volunteer opportunity does not have any upcoming dates or dates that occur prior to the occurrences of the related volunteer opportunities, a volunteer will not be able to complete their registration for either the volunteer opportunity or prerequisite volunteer opportunity. So make sure that someone is monitoring the prerequisite volunteer opportunity to ensure that it has an adequate supply of occurrences for the volunteers.

Prerequisites in the Contact Record


Prerequisites Attended

Prerequisite Volunteer Opportunity	Start Date & Time	Status	Attendance Status	Connection
Learn how to lead	08/02/2013 04:00 PM	Confirmed	Please Verify	CO-088021
VITA Training	08/24/2013 12:00 PM	Confirmed	Please Verify	CO-088334

If the PrerequisitesRelated visualforce page has been added to the page layout, then users can view the prerequisites that a contact has made a connection to and confirm as needed.

Enabling Prerequisites

System Admins that wish to enable this functionality can follow the steps at this link.

Multilingual Volunteer Opportunities (in Salesforce)

If your instance of HandsOn Connect offers more than one language on the public site, you can choose to translate your volunteer opportunity into additional languages.

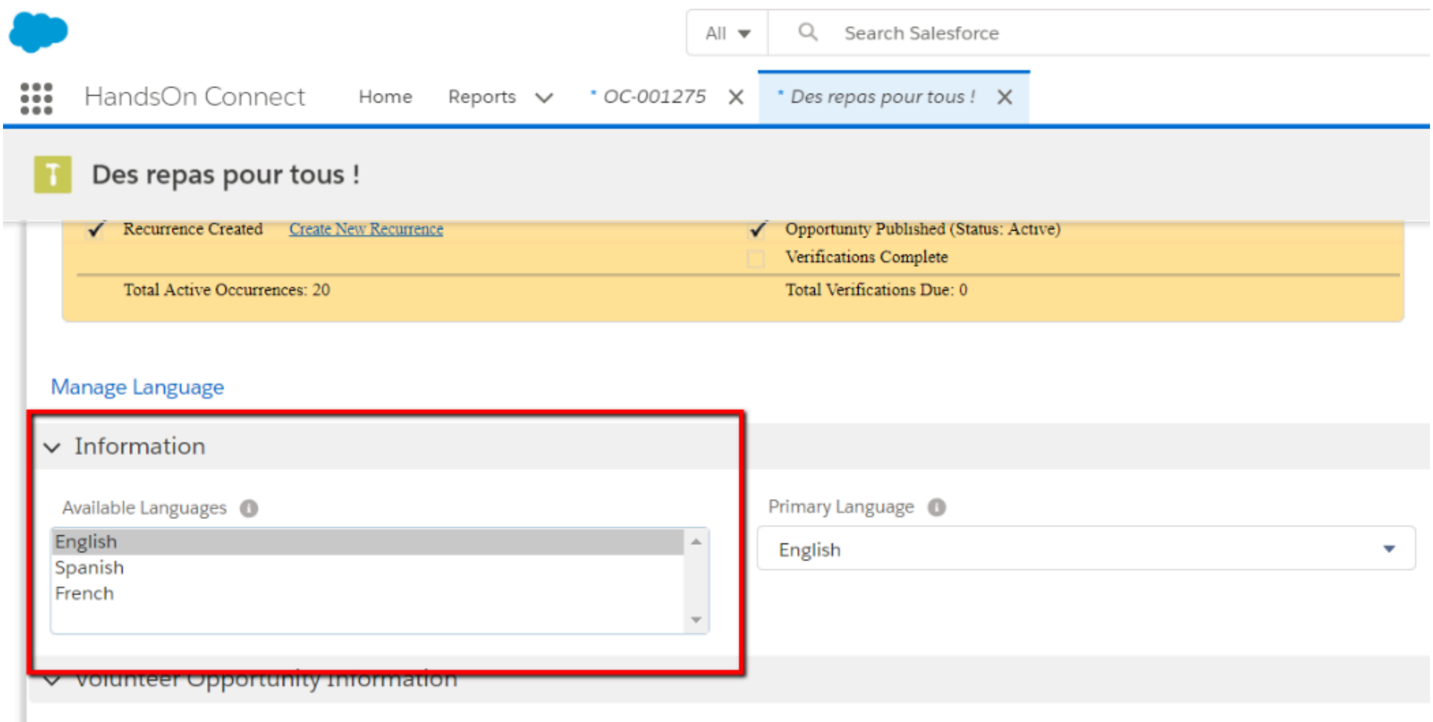
This article applies to create and editing opportunities in Salesforce. If you are looking for information related to the Sharing Portal, please [click here].

When your HOC instance is configured for multiple languages, you must set the languages where the Volunteer Opportunity should appear in searches on your Public Site.

For example, when the Volunteer Opportunity has the default language English, and you need to display the Opportunity in another language, please follow these steps:

1. Go to Salesforce.
2. Go to the Volunteer Opportunity record.
3. In Available Languages select all languages that you need to display the Opportunity.
4. Click on Save.
5. Then go to Manage Language.
6. Add the translations for each language.
7. Save the changes.
8. Wait for 5 to 10 minutes for the search index to update.

If your site supports more than one language you will see multiple tabs for language when you create or edit a volunteer opportunity:



Depending on your page layout, the Available Languages and Primary Language may be in another place on the page or hidden.

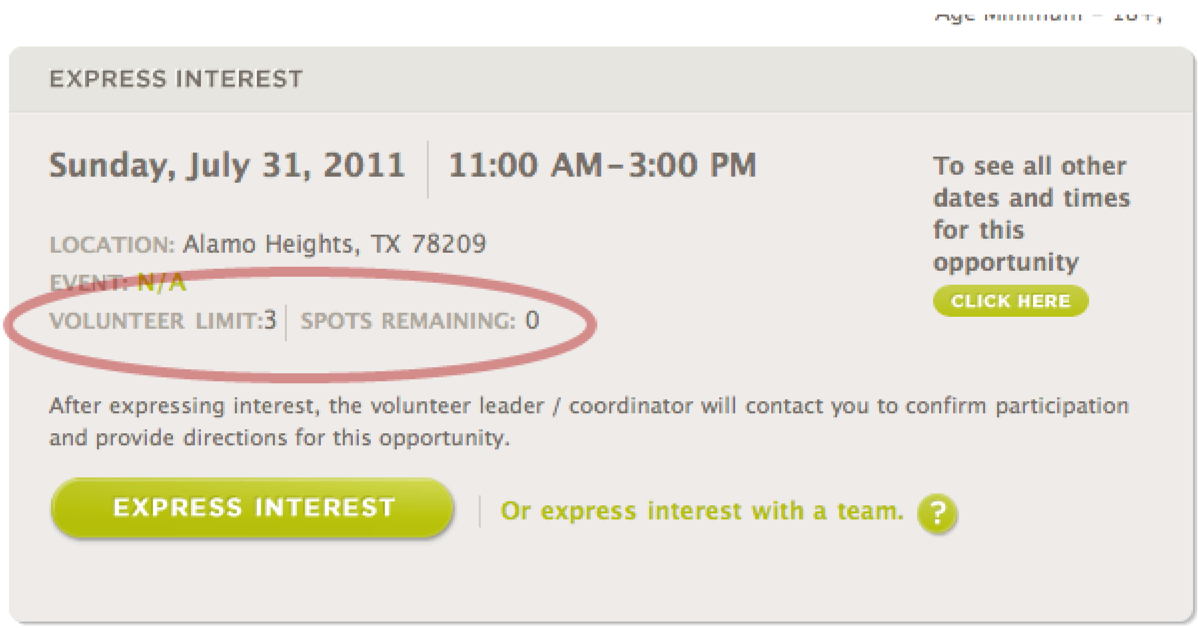
Waitlisted connections

How volunteers can join the waitlist for occurrences that have no space remaining

Each occurrence of a volunteer opportunity has a maximum number of sign-ups that are allowed, as defined in the occurrence record.

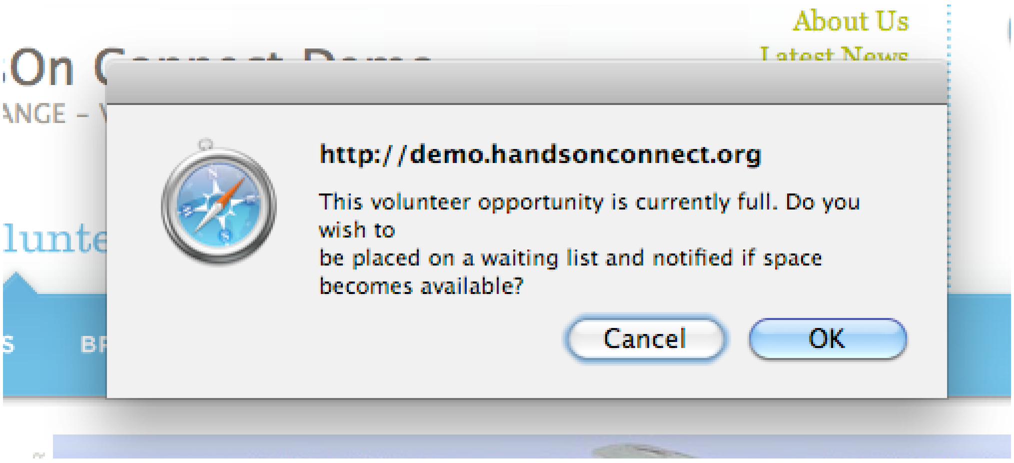
When an occurrence reaches capacity, volunteers are given the option of adding themselves to a wait list for that opportunity. (Waitlists are for Date and Time Specific Opportunities, but not for Individually Scheduled Opportunities where a volunteer can have multiple connections)

In this example we see an opportunity detail page for an occurrence that has no remaining space



If we click on Express Interest (or Sign Up for a full sign-up opportunity) we get a pop-up

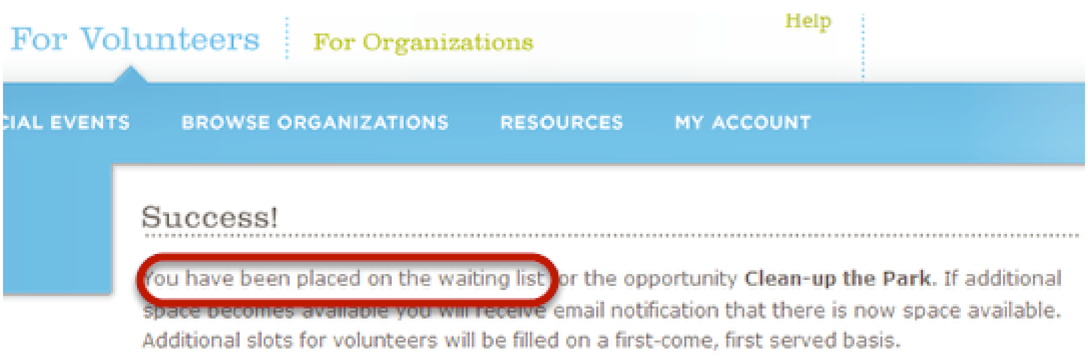
Warning that opportunity is full, and option to be added to waiting list



If their are additional questions, we'll still be asked them on the next screen.

After clicking the submit button we'll be taken to a page that will notify us we're on the waiting list.

Success Page for wait list connections



Note: There is a site setting for HandsOn Connect where "Full Occurrences are not displayed". If your site has been configured to not display full occurrences, then volunteers will not be able to join waitlists.

If you do not wish to have volunteers join waiting lists, make a request to update your site to not display Full Occurrence. (Once they are full - they will be removed from search so that no one sees them and tries to join the waitlist).

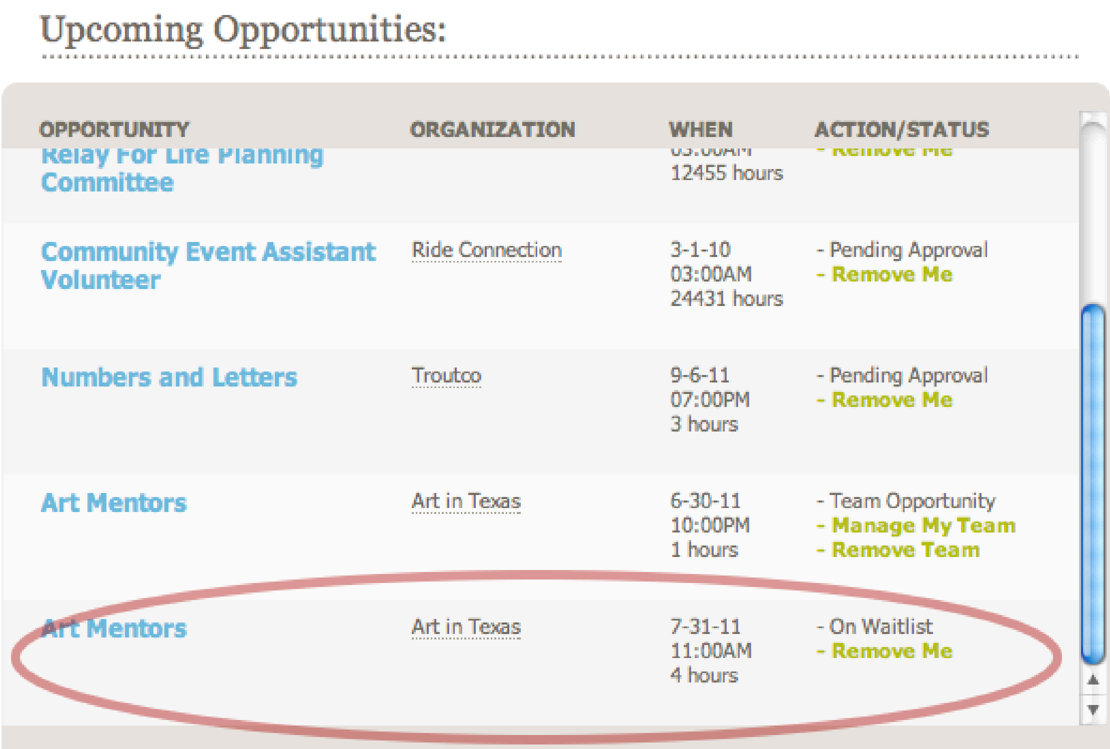
There is also an advanced option available at the occurrence level to Turn of the Waitlist for an individual occurrence. See this article on how to enable 'turn off waitlist' for occurrences.

Seeing who is waitlisted for an occurrence

When a volunteer joins the waitlist -- they are not sent an email but it does show up in the "Upcoming Opportunities" in their account.

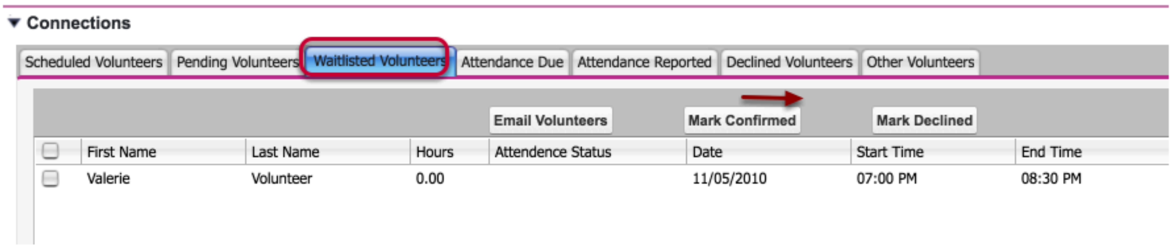
The Opportunity Coordinator is sent an email alerting them that someone has joined the waitlist. The text of this notification can be edited in the email template "Notification of Volunteer Wait List"

The Volunteer's View of their waitlisted connection



Valerie can see she is on the waitlist for the 6/31/11 occurrence of Art Mentors. She has the option of removing herself from the waitlist if she decides she won't want to join if space becomes available.

The Opportunity Coordinator's view of waitlisted connections



Waitlisted volunteers appear in the Waitlisted Volunteers tab of the connections grid in the occurrence record.

You can administratively move someone from the waitlist to confirmed status by selecting their record (Left checkbox) and then clicking the "Mark Confirmed" button. This will move them to the confirmed volunteers tab.

Volunteers who are notified when space becomes available, who then signup for the opportunity, have their connections automatically updated from waitlisted to confirmed.

Notifications to waitlisted volunteers when space becomes available in an occurrence

Whenever the number of connections for an occurrence drops below the maximum number of signups permitted, a workflow sends an email to all volunteers who are in the waitlist notifying them that space is now available for signup. The template used for this is "Waitlisted opportunity now open"

Here's the default text (with merge fields) of the email sent to all volunteers when space becomes available


HandsOn
CONNECT DEMO

Dear {!Contact.Name}:

Not too long ago you were interested in volunteering for the volunteer opportunity
{!HOC__Occurrence__c.HOC__Volunteer_Opportunity__c} that was taking place on
{!HOC__Occurrence__c.HOC__Start_Date_Time__c}.
When you last looked this opportunity had reached capacity, and you had asked to be notified if space for additional volunteers became available.

Good news! One or more volunteers removed themselves from the opportunity and there is now a limited amount of space for additional volunteers. These available spaces will be filled on a first-come, first-served basis -- so hurry. If you're still available and interested in volunteering for this opportunity, please click below to log in, return to the sign-up page and claim one of the remaining spaces.

{!HOC__Occurrence__c.HOC__HOC_Domain_Name__c}HOC__Volunteer_Opportunity_Details_Page?id={!HOC__Occurrence__c.Id}

We hope you can join us!

Thanks,
The {!Organization.Name} staff

As the email states -- the available space will be filled up on a first come, first-served basis (Not in the order that people were added to the waitlist). All waitlisted volunteers are notified.

The goal of this approach is to fill available spaces and bring the occurrence back to full as quickly as possible!

Volunteers may arrive and find the occurrence is full again!

If space again becomes available - this email will be triggered again anytime there are spaces available to fill up.

Note: If you have people on the waitlist and can handle more volunteers -- just edit the occurrence by raising the maximum number of volunteers for the occurrence. This too will trigger the 'space available' email for everyone on the waitlist.

When volunteers who were waitlisted DO signup for the opportunity - their connection is updated and they are changed to status = confirmed like any other connection.

Working with self-reported Connections

How self-reported Hours show up for existing occurrences - and how to verify

There are two types of "Self-Reporting" in HandsOn Connect.

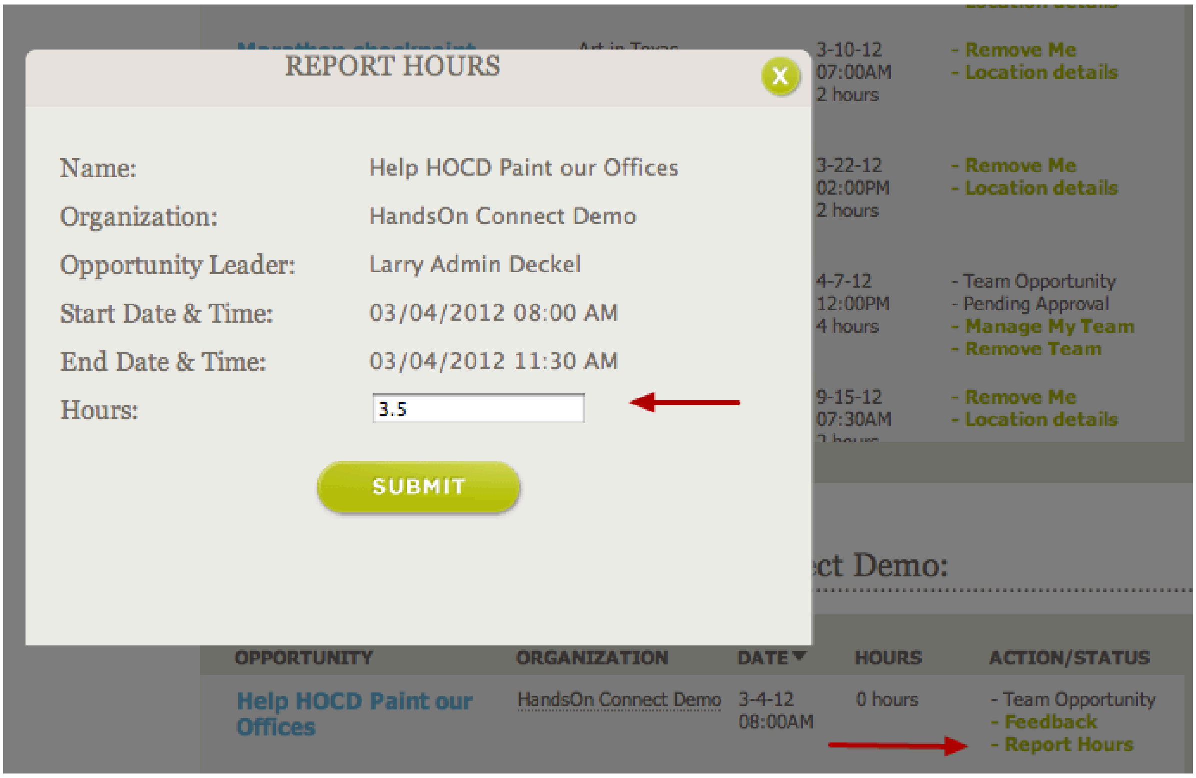
1) Volunteer can "Report Hours" of service for non-verified opportunities in their volunteer history.

2).Volunteers can self-report hours of service for opportunities that didn't exist on the public site. (See the two articles in this chapter for details on that form of self-reporting.)

NOTE: You can request enabling or disabling either of these two ways of reporting hours. By default, they are either both on or off, but if you only wish to allow one form of self-reporting-hours, open a support request and we can enable (or disable) either one of them..

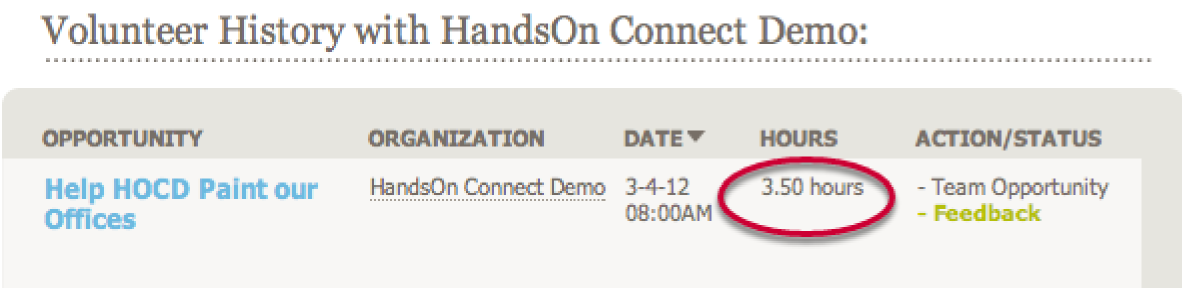
The volunteer clicks on the Report Hours link, and self-reports that they were there:

On a volunteer's overview page, they see their volunteer history. In the history section, any past opportunity where attendance has not yet been reported offers a "Report Hours" link. Clicking on this link opens a form to self-report your hours for that occurrence.



When they click submit, it updates their connection record and the occurrence record grid with their self-reported hours.

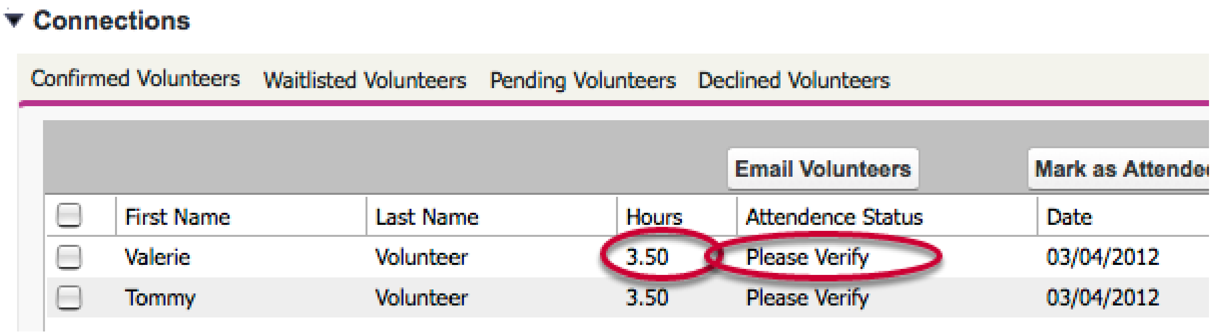
Her volunteer history now shows the hours she's reported - but they are not marked as verified



Her Total Hours Served summary reflects these unverified hours, but her Verified Hours do not change.

When a volunteer self-reports their attendance hours, an email reminder is sent to the Opportunity Coordinator asking them to verify those self-reported hours. (See below)

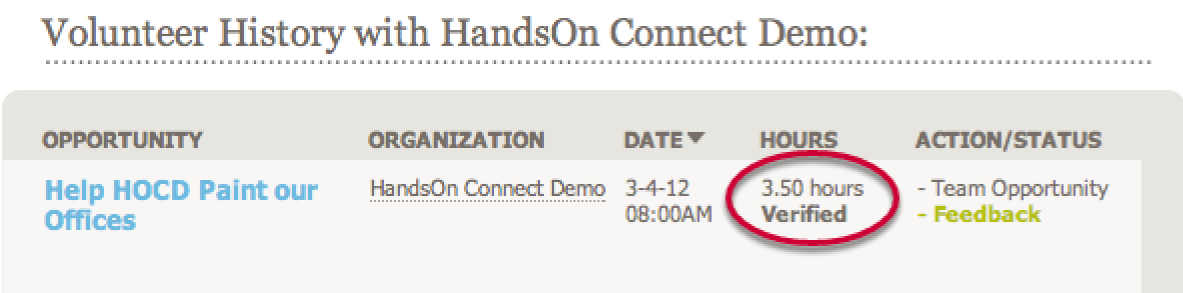
Connection Grid for this occurrence looks like this after Valerie Submits.   Now its up to the Opportunity Coordinator to verify her self-reported hours.



Notice that Valerie and Tommy have 3.5 hours attributed, even though the attendance status is still "Please Verify".   This means the hours were self-reported. If a volunteer doesn't self-report, the hours column would say 0.

The opportunity Coordinator verifies in the usual way -- and when they mark them as attended - Valerie will see the hours are marked as **Verified.**

Her volunteer history now reflects these hours as verified



Her verified hours now reflect her new total in her account overview.

This is the email sent to the Opportunity Coordinator when a volunteer self-reports from their volunteer history.

HandsOn
CONNECT DEMO

Dear Opportunity Coordinator or Volunteer Leader

On 2/21/2012 7:00 PM you led the volunteer opportunity "Dance Dance Dance" with volunteers recruited on the HandsOn Connect Demo website.

Volunteers are relying on you to keep their civic transcript up to date, so please use the link below to log into your account and report attendance and service hours for this opportunity.

Thanks for helping us measure the impact volunteers have had in our community, and assist your volunteers in maintaining a verified civic transcript.

Thank You,
The HandsOn Connect Demo Staff

When a volunteer clicks on the **Report Hours** link, the following workflow is activated:

Workflow: Request Hours

Email Alert: Request Hours

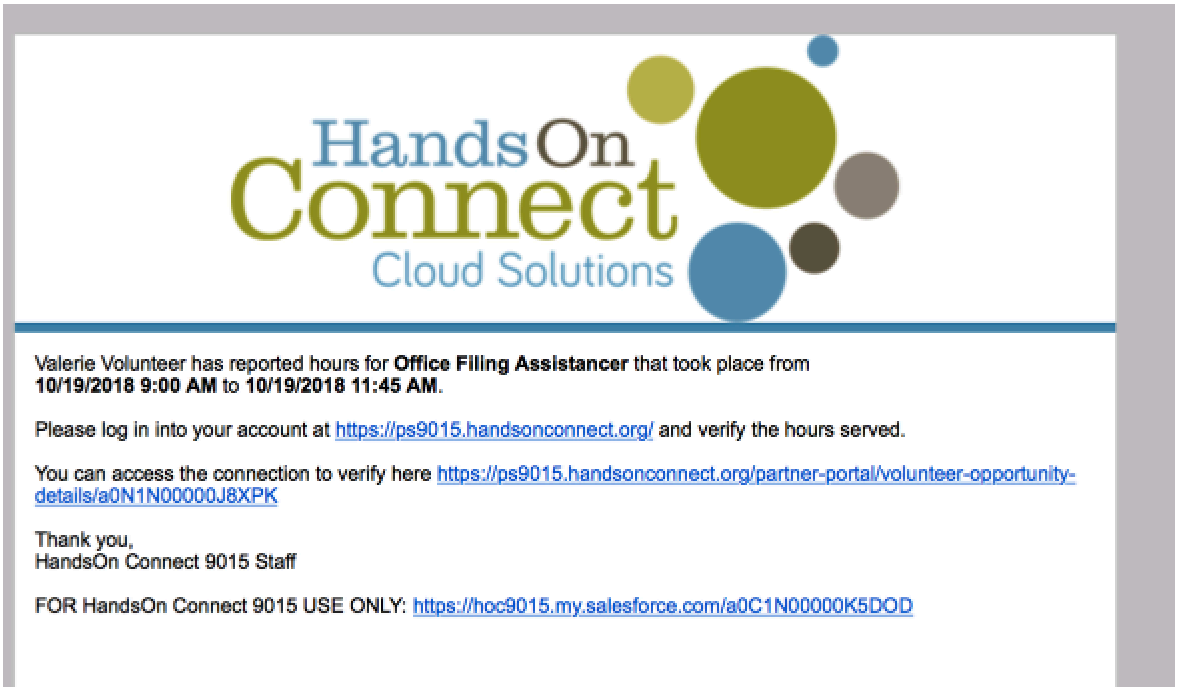
Email Template: Reminder to report attendance and service hours.

Self-Reported Volunteer Opportunities & Occurrences for your existing organizations

When a volunteer self-reports a new opportunity with one of your existing partners, a new connection record is created.

The Primary Contact for your partner organization receives an email alerting them that a volunteer has 'submitted hours for verification'.

This email is sent to your partner organization's Primary Contact.



Valerie Volunteer has reported hours for **Office Filing Assistancer** that took place from **10/19/2018 9:00 AM** to **10/19/2018 11:45 AM**.

Please log in into your account at https://ps9015.handsonconnect.org/ and verify the hours served.

You can access the connection to verify here https://ps9015.handsonconnect.org/partner-portal/volunteer-opportunity-details/a0N1N00000J8XPK

Thank you,
HandsOn Connect 9015 Staff

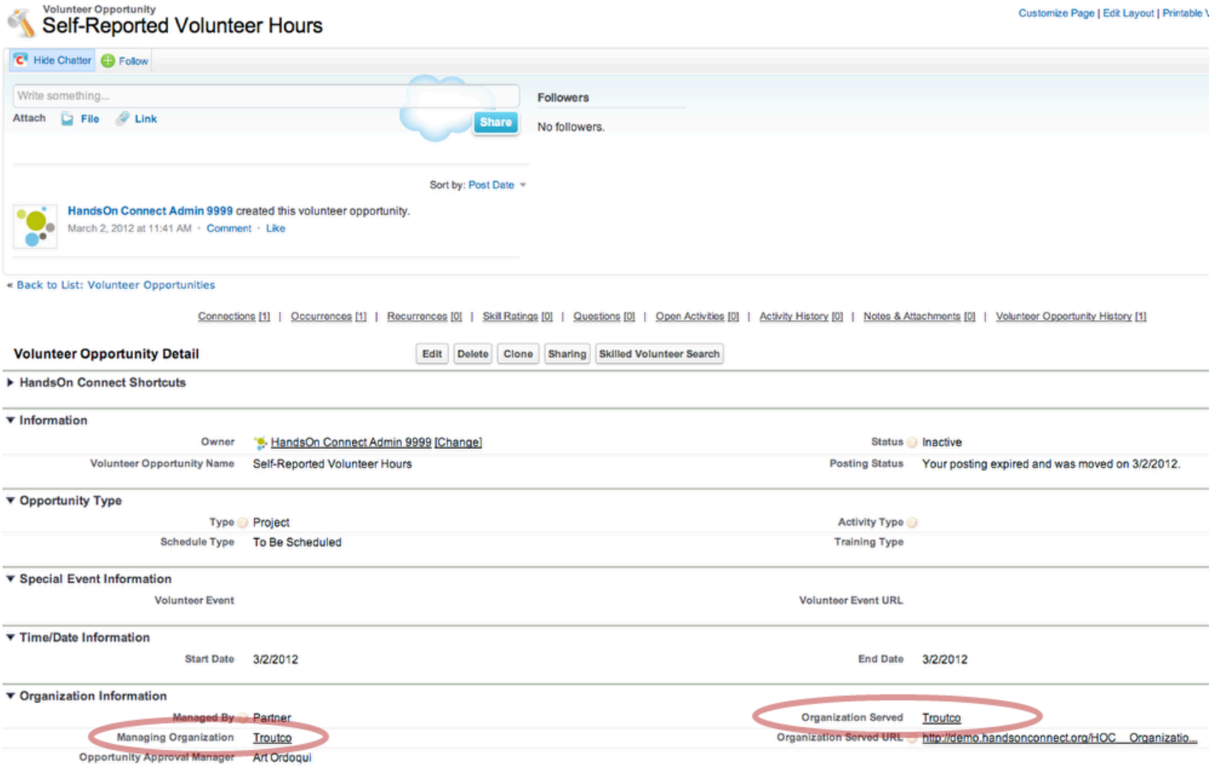
FOR HandsOn Connect 9015 USE ONLY: https://hoc9015.my.salesforce.com/a0C1N00000K5DOD

Partners logging in to their portal, will find this link takes them directly to the connection record. (Note, they should log in first)

But let's look at the bigger picture of how this connection is created and its related records.

A Volunteer Opportunity Record called "Self-Reported Volunteer Hours" is automatically created for each

Organization in your database



They are all distinguished by:

Status = inactive

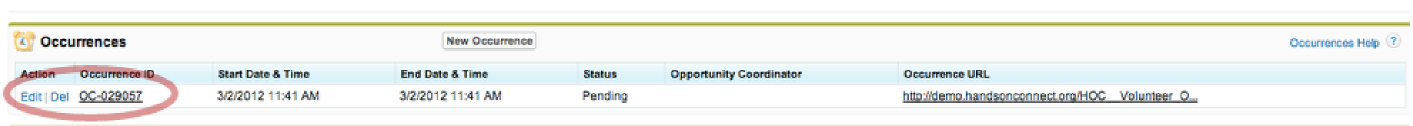
Schedule Type = To Be Scheduled

The only thing that tells one of these apart from others in the system, is that the Managing Organization and Organization Served is the name of an Organization in your system.

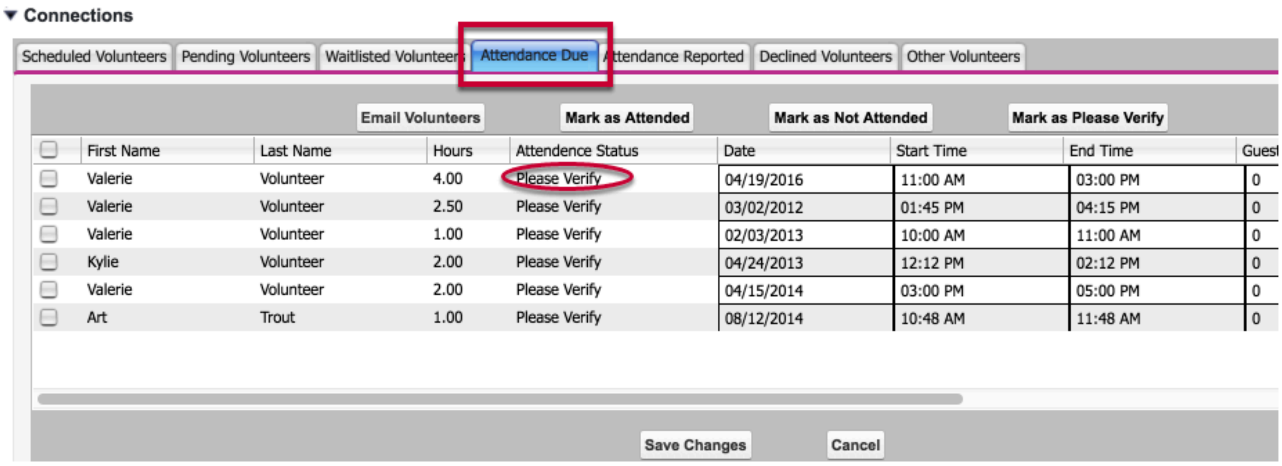
It's used for the purposes of the connection record created by volunteers when they self-report on the public site, and they specify one of your partner organizations as the organization served.

This record cannot be edited or deleted.

Each of these "Self-Reported Volunteer Hours" Volunteer Opportunities has one unique occurrence associated with it.



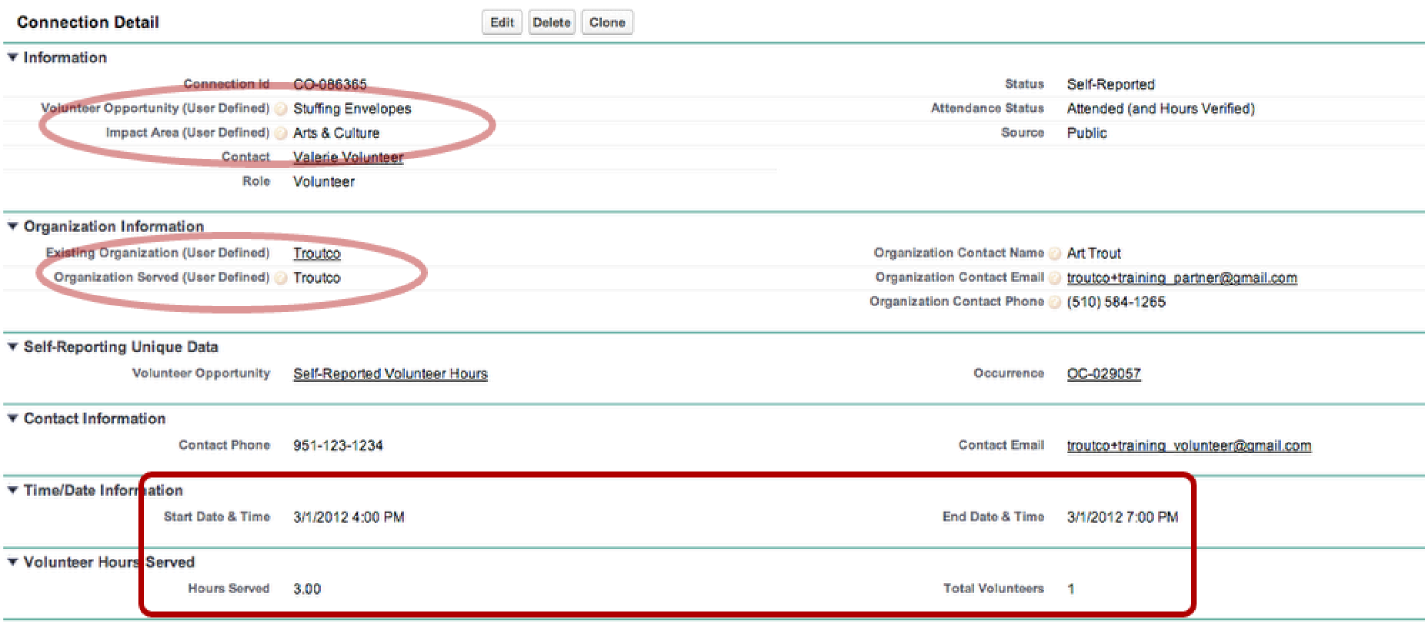
This occurrence record has a connections grid, which lists all the self-reported connections



In this case - all self-reported connections where Troutco was the organization served, can be found here, and your staff, or a partner staff for Troutco, can verify attendance in the usual way!

Self-Reported connections that have not yet been verified will show up in the "Attendance Due" tab.

Self-Reported Connection Record View



In the connection record you can see the info the volunteer entered:

- Volunteer Opportunity Name

- Impact Area
- Existing Organization & Organization Served (as entered by the Volunteer from the picklist).
- Start and End Date and Time and hours served.

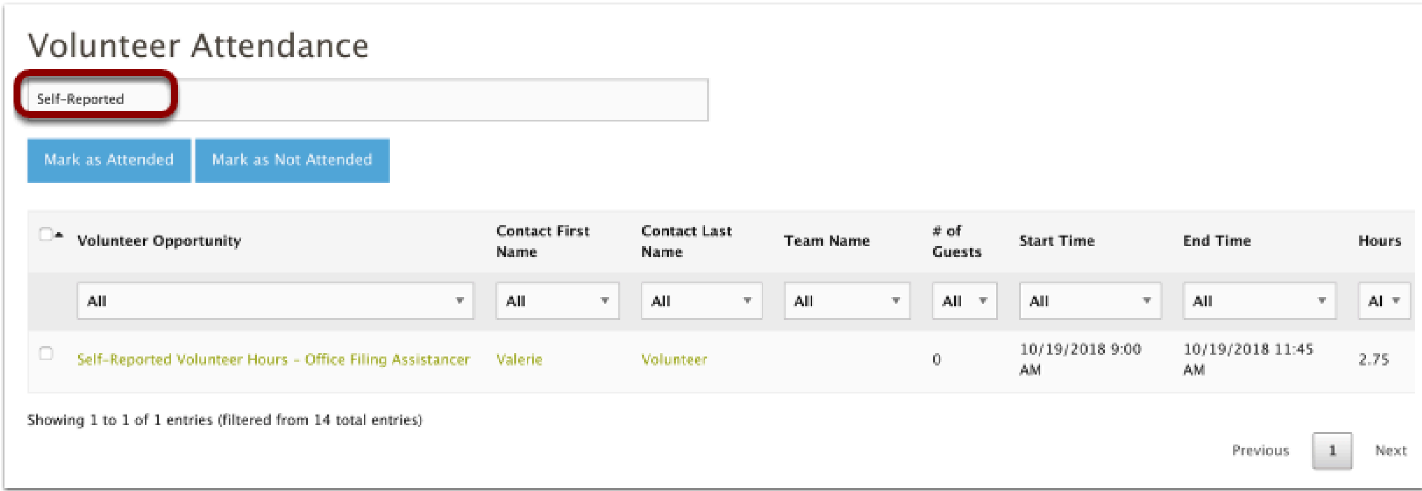
The status of these connections appears as **Self-Reported** and remains so.

If you choose to report attendance at the Connection Level (rather than using the occurrence grid), Just mark the attendance status as Attended (and Hours Verified).

Best Practices for Verifying Self-Reported Volunteer Hours (Partner Staff in the sharing portal)

1) Log into the partner portal:

2). Go to the "Report Attendance" tab - and in the search box type "Self-Reported"

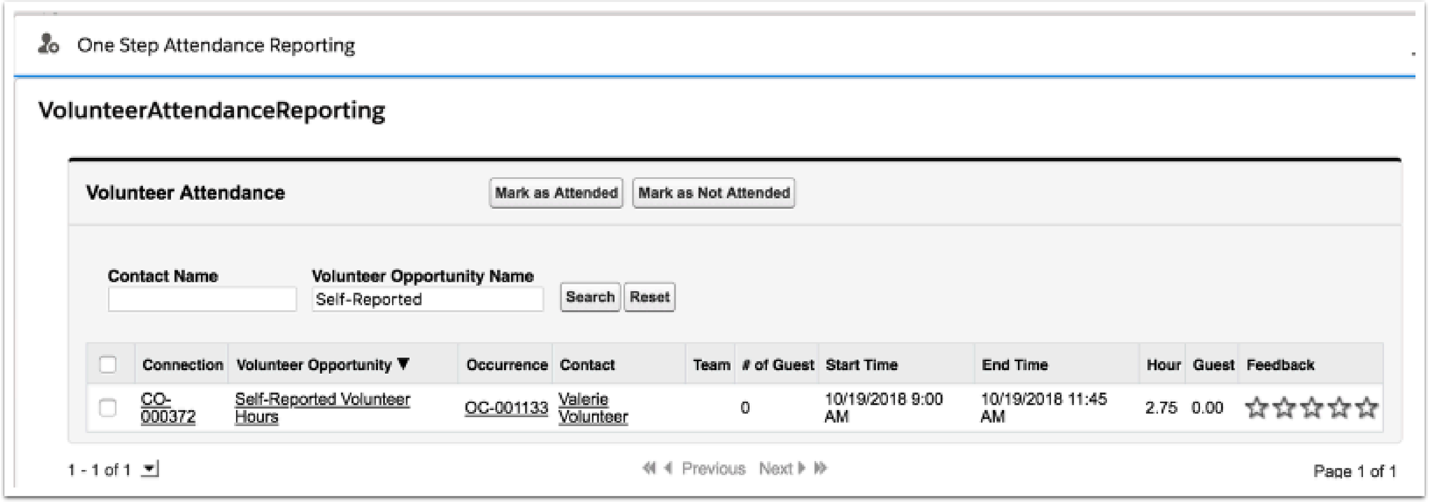


All self-reported connections where attendance has not yet been verified will appear and can be verified in the same manner as verifying any other connections.

Best Practices for Verifying Self-Reported Volunteer Hours (Staff and System Admins)

1) Go to "One Step Attendance Reporting" and type in "Self-Reported" in the Volunteer Opportunity Name field.

2) All self-reported connections will be visible, and you can verify those you wish to. (This will include both affiliate and partner managed self-reported connections)


One Step Attendance Reporting
VolunteerAttendanceReporting
Volunteer Attendance
Mark as Attended
Mark as Not Attended
Contact Name
Volunteer Opportunity Name
Self-Reported
Search
Reset
Connection
Volunteer Opportunity
Occurrence
Contact
Team
# of Guest
Start Time
End Time
Hour
Guest
Feedback
CO-000372
Self-Reported Volunteer Hours
OC-001133
Valerie Volunteer
0
10/19/2018 9:00 AM
10/19/2018 11:45 AM
2.75
0.00
1 - 1 of 1
Previous
Next
Page 1 of 1

Self-Reported Volunteer Opportunities for organizations not already in your database (new, potential partners)

When a volunteer self-reports an opportunity on the public site, for an organization that is not an 'active partner' of your organization -- it creates a self-reported volunteer connection, and triggers an email to be sent to the contact they designate with that organization - encouraging them to contact you and become a partner.

The following email is sent to the contact self-reported by the volunteer:

From: **Valerie Volunteer <troutco+training_volunteer@gmail.com>**
Subject: The Welsh Foundation a volunteer reported hours with your organization
Date: March 6, 2012 4:08:47 PM PST
To: troutco+welsh@gmail.com

HandsOn CONNECT DEMO

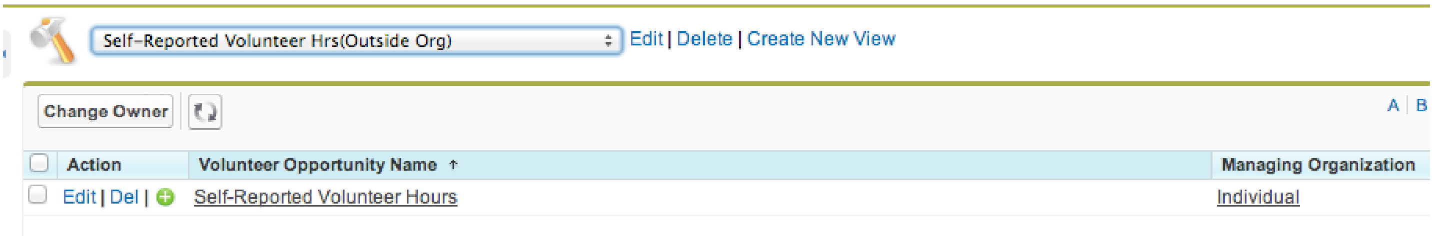
HandsOn Connect Demo recently received a notification of hours served with your agency from a volunteer registered at http://demo.handsonconnect.org/

We would like to extend the opportunity for you to learn more about the programs and services we offer so that we may assist you in helping recruit and manage your volunteers.
Please take a moment to visit the "Become a Partner" page on our site to learn more.
http://demo.handsonconnect.org/HOC__Become_a_Partner_Page

If you do not wish to become a partner, but do wish to verify the hours reported by this volunteer, please contact Art Ordoqui at troutco+demo@gmail.com or (209) 378-1234.

Thank you,
HandsOn Connect Demo Staff

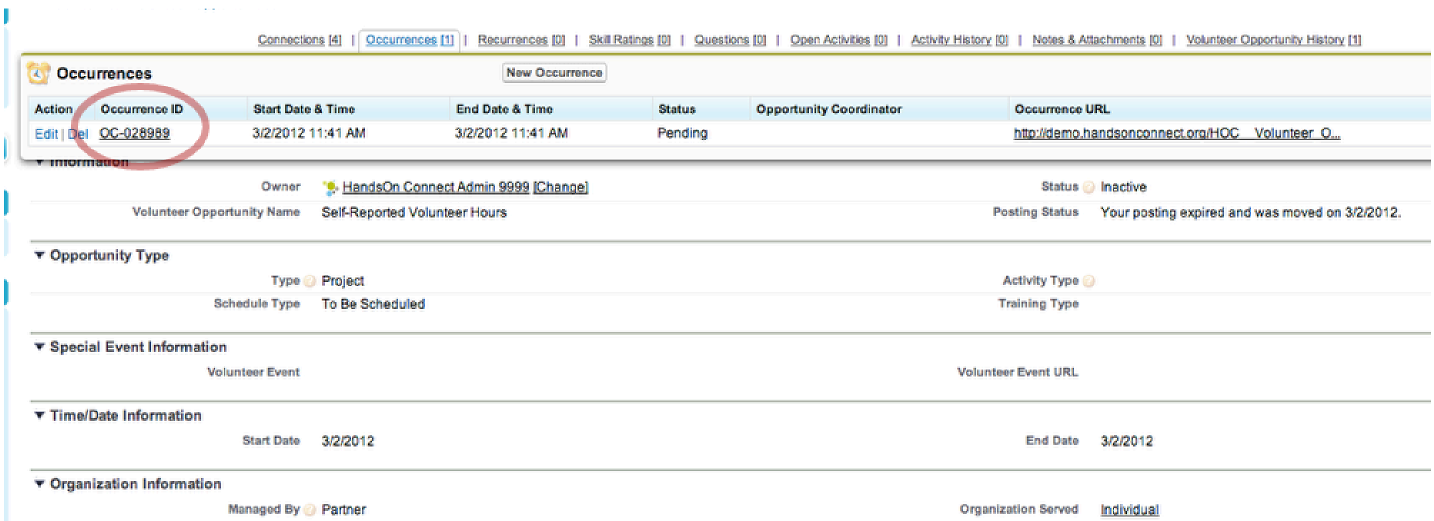
A New Connection is created with the organization served noted as "individual"



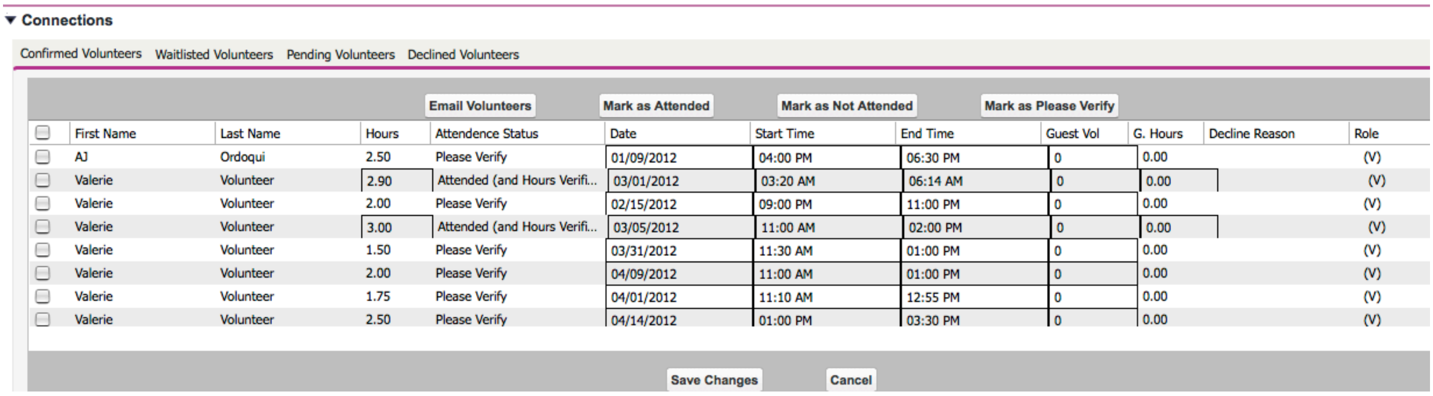
The easiest way to find these connections is through a view in the Volunteer Opportunity Object called: **"Self Reported Volunteer Hrs(Outside Org)**

You can see there is only Volunteer Opportunity that is named Self-Reported Volunteer Hours and associated with the managing organization **Individual.**

Use the related list to go to the one occurrence record for this Volunteer Opportunity



The connection grid in this occurrence record has all the self-reported connections not associated with one of your active partner organizations

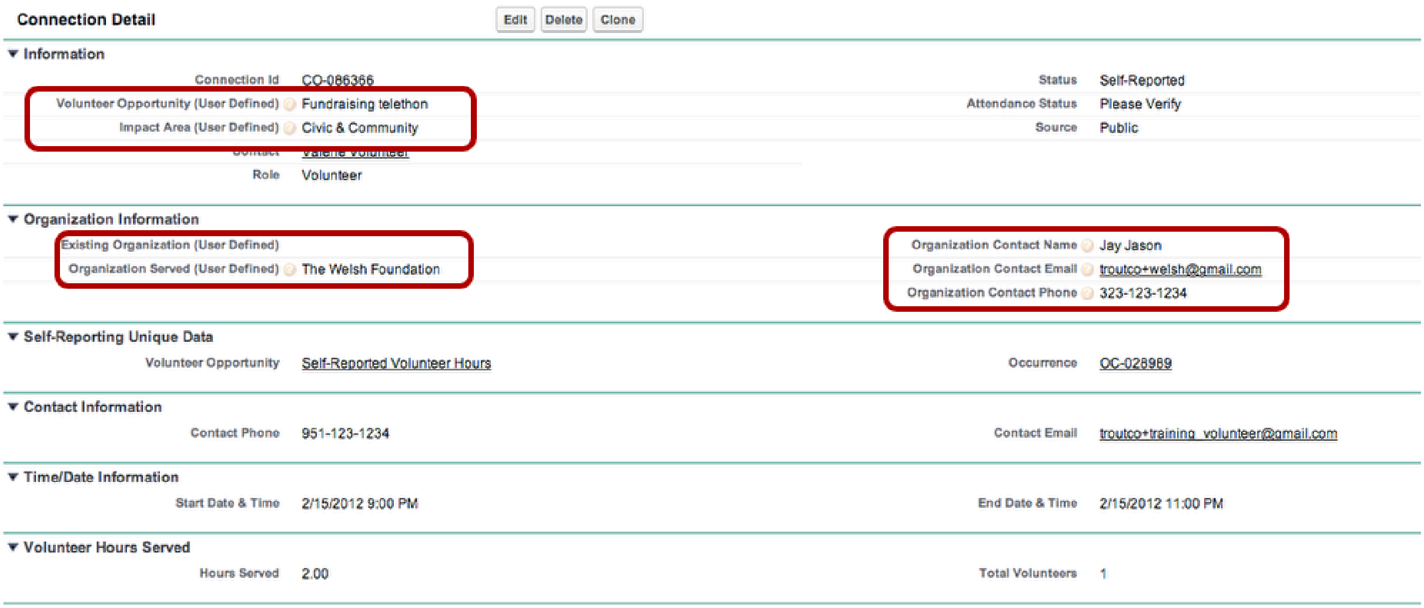


You can verify the connections in the usual way, by putting in a check mark and marking the connection as "Attended (and hours verified"

However, you can't see much detail about these self-reported connections in the grid :-(

If you want to see the opportunity name, name of the organization, etc... you'll need to click on the Connection Related List and drill down to the individual connection records. It may be easier to verify attendance here.   (For the most part - unless you are reaching out to these organizations that aren't partners of yours - you won't be able to verify these connections for volunteers anyway.   But if you DO hear from the organization and wish to verify these self-reported opportunities - you can do so in this manner!)

The connection record for a self-reported connection with a 'new' organization not in your database looks like this.


Connection Detail Edit Delete Clone

Information

Connection Id	CO-086366	Status	Self-Reported
Volunteer Opportunity (User Defined)	Fundraising telethon	Attendance Status	Please Verify
Impact Area (User Defined)	Civic & Community	Source	Public
Contact	Valerie Volunteer		
Role	Volunteer		

Organization Information

Existing Organization (User Defined)		Organization Contact Name	Jay Jason
Organization Served (User Defined)	The Welsh Foundation	Organization Contact Email	troutco+welsh@gmail.com
		Organization Contact Phone	323-123-1234

Self-Reporting Unique Data

Volunteer Opportunity	Self-Reported Volunteer Hours	Occurrence	OC-028989

Contact Information

Contact Phone	951-123-1234	Contact Email	troutco+training_volunteer@gmail.com

Time/Date Information

Start Date & Time	2/15/2012 9:00 PM	End Date & Time	2/15/2012 11:00 PM

Volunteer Hours Served

Hours Served	2.00	Total Volunteers	1

Here you can see additional information not available on the connection grid itself:

- The name of the Volunteer Opportunity submitted by the volunteer
- The self-reported impact area
- The "Organization Served" as reported by the user (not the "existing organization" is blank because they do not exist in their database. However, if they DO exist in your database, you can update this record through the lookup field "Existing Organization" - to connect them to an organization you add to the system.
- Contact info for this self-reported organization.

Only System Admins and Partner Staff can access and verify these self-reported connections.

The business process by which you would or wouldn't verify self-reported hours with non-partner organizations is up to you! But this presents an opportunity for you to reach out to the organization contact and try to bring them in as a partner organization!

(Advanced) Self-Reporting Configuration Options

HandsOn Connect has a number of configurations available for Self-Reporting. By default, self-reporting is on. But you can request any of the following options to be configured for your site.

Option 1: Self-Reporting Active

Self-Reporting can be Active - or it can be turned off for your site.

If it is turned off, none of the links for self-reporting will be displayed and volunteers will not be able to self-report.

Option 2: Earliest Allowable Date

By default, Volunteers can self-report that they volunteered for ANY date and time prior to NOW. (You cannot self-report that you've volunteered in the future).

There is an option however where you can limit how far into the past a volunteer can self-report.

The optional settings are:

- No Limit. (default setting)
- Past Month only
- Past 6 months only
- Past Year only

Option 3: Allow self-reporting to non-partner organizations

HOC allows a volunteer to self-report volunteer time with any of your partners, AND any other organization. (See this article for how reporting to outside organizations is handled).

You have two options here:

- Allow self-reporting to non-partners (outside organizations)
- Limit self-reporting to partner organizations and your organization Only.

Option 4: Allow Regularly Scheduled Connections

If 'allow regularly scheduled connections' is on, then a volunteer can create a recurring series of connections all at once (similar to signing up for multiple connections of an Individually Scheduled Opportunity). (i.e. "I volunteered at Troutco for the opportunity "Filing Help" on Mondays from Oct 1 - Oct 31 from 2 pm - 5 pm.

If this is not enabled, the volunteers can only report one occurrence at a time.

You have two options:

- Allow submitting regularly scheduled connections for the same self-reported opportunity.
- DO not allow a volunteer to submit more than one connection at a time.

(To request a change to your self-reporting configuration - open a help ticket and explain which of the settings above you want added or changed)

Skilled Volunteer Search

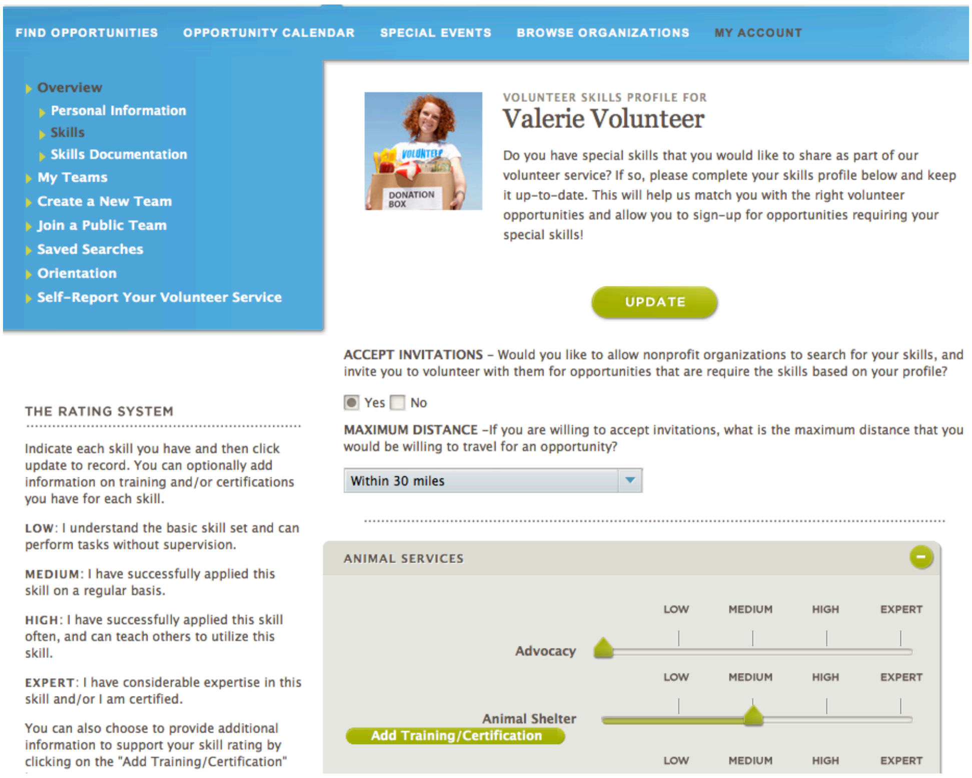
Both Volunteers and Volunteer Opportunities have skill ratings associated with them

We saw earlier in this manual how you can [associate skill ratings to a volunteer opportunity.]

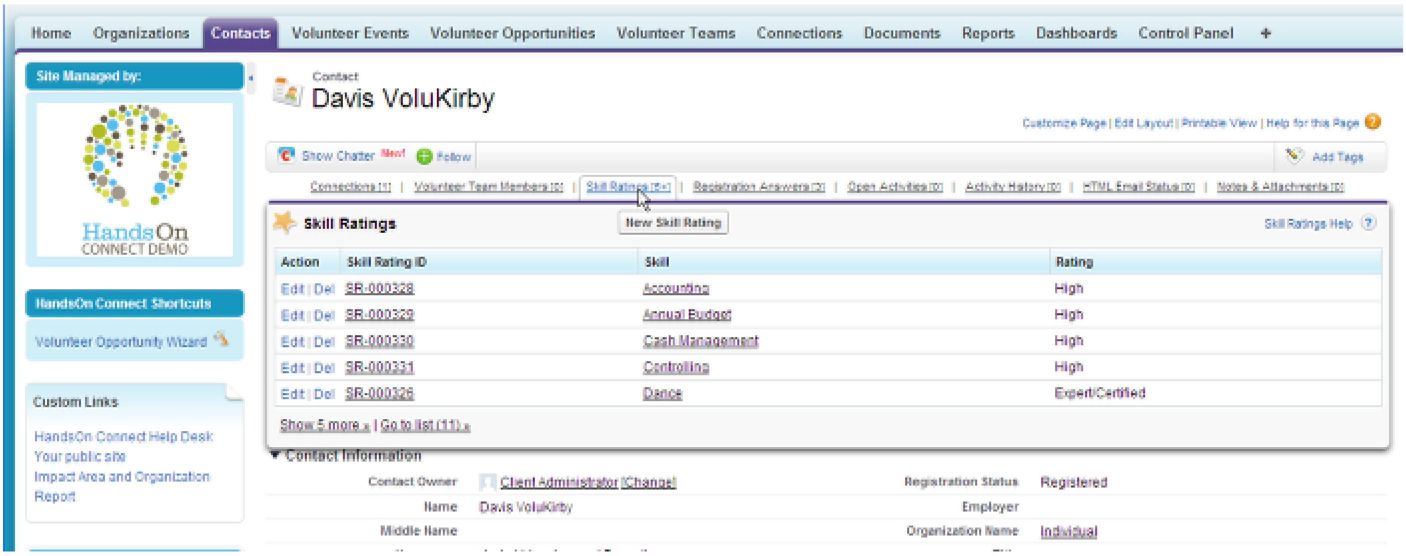
Volunteers can set up a skill profile on the public site, and you can also view and edit the skill profiles for individual volunteers,   (NOTE: if your organization is not using skills, these can be turned off in your instance. If you are not using skills you can disregard this chapter)

Here's how you can administratively view the skills associated with individual volunteers.

Volunteers can enter their own skill ratings and attach documentation to support those ratings

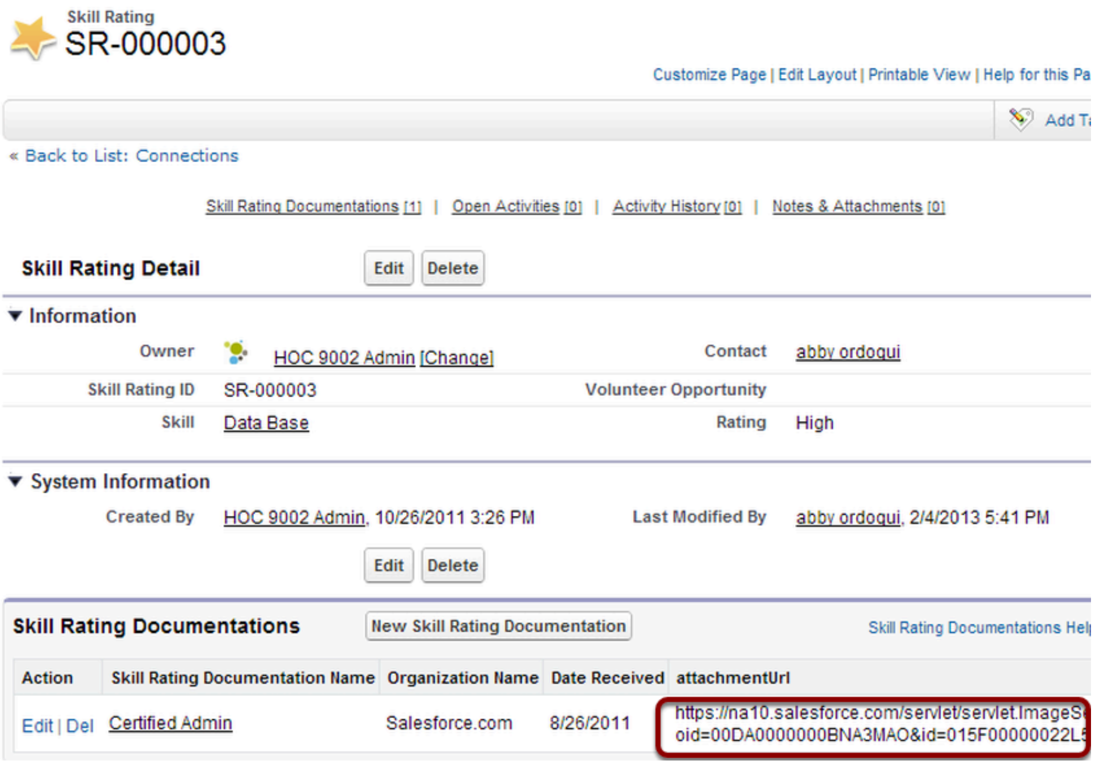


Administratively, you can view the skill ratings for a volunteer by looking at the Skill Rating related list in the contact record.



You can click on the Skill Rating record to see details of a skill rating.

Skill Rating Record and access to the skill rating documentation

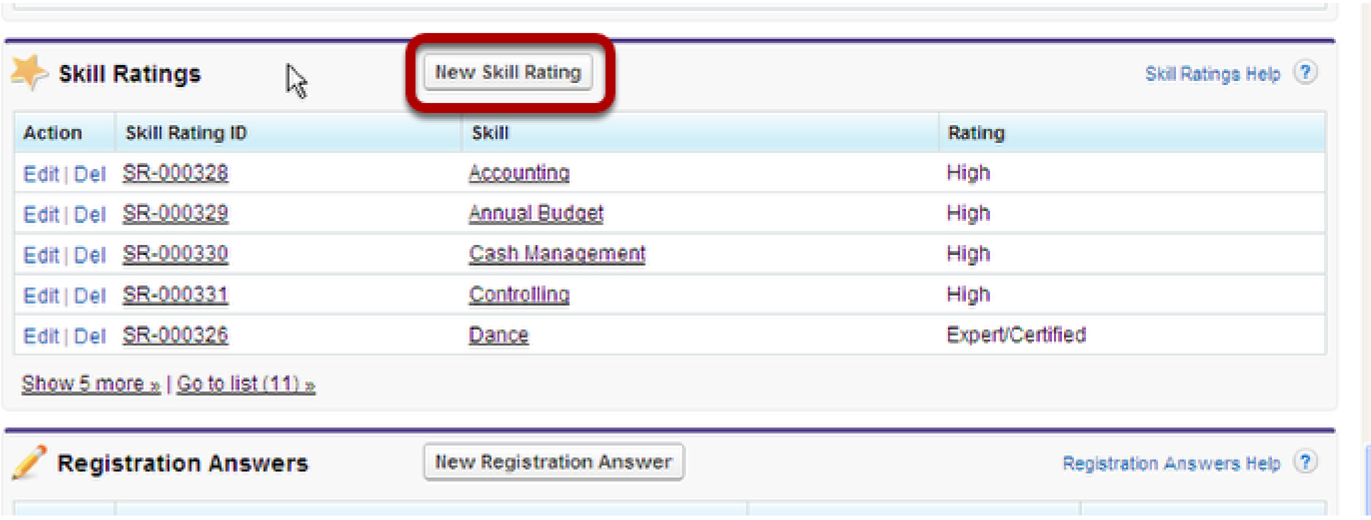


For System Admins, Staff, and Premium Portal users, the Skill Rating Documentation can be accessed through the Skill Rating Record.

In the skill rating record, there is a Skill Rating Documentation which provides that Skill Rating Documentation Name (Training or Certification Earned), Organization Name, Date Received, and the attachmentURL. The attachmentURL is the link to the documentation file that the volunteer uploaded. You can copy and paste the link in a new tab or window to access it (It is not a live link)

Note: All the skill-related documents in the system are stored in a folder in the DOCUMENTS Tab called "Skills Attachments" The 'author' of these documents will be the volunteer who uploaded the document (You could opt to create a report that showed all the documentation in this folder, its author, and the URLs -- if you wanted an overview of all the skill-related documentation in your system).

It's also possible to administratively create a skill rating for a volunteer if desired.



To administratively create a new skill Rating for a volunteer, click the New Skill Rating button.

Note: It is not currently possible to add skill rating documentation to a skill rating. (You can however, always administratively add attachments to a contact record directly).

In the next article - we'll show how the system can search for volunteers whose skills match the skills in a volunteer opportunity.

Click here to see the next article.

Skilled Volunteer Search

When you have a volunteer opportunity that is associated with one or more skills, then you can run a search to find volunteers in the database who match those skills.

Once you've found a match, you can 'invite' those volunteers to look at, and sign up, for the volunteer opportunity.

A volunteer opportunity must first have one or more skills associated with it.

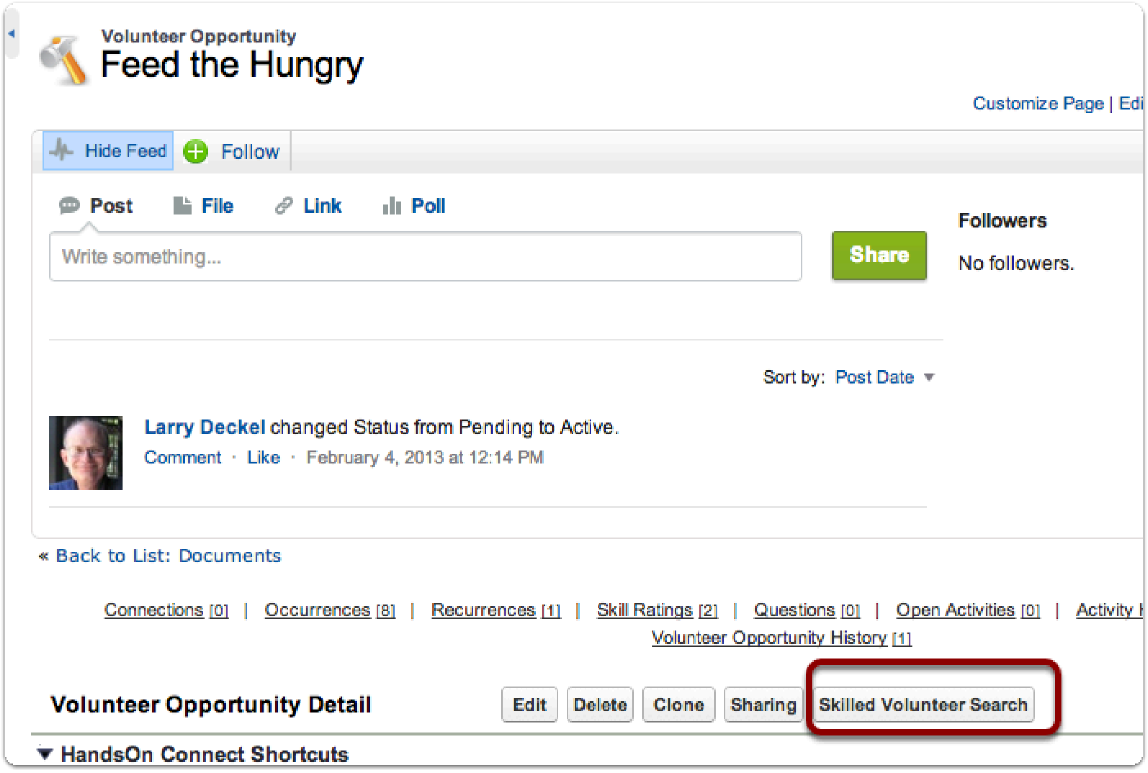
Skill Ratings New Skill Rating Skill Ratings Help

Action	Skill Rating ID	Skill	Rating
Edit | Del	SR-001659	Food And Beverages	Medium
Edit | Del	SR-001662	Shelter / Food Bank Knowledge	High

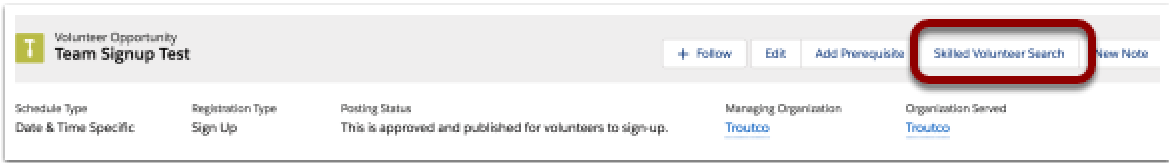
This opportunity, 'Feed the Hungry" has two skill ratings associated with it. See this article on how to add skills to a volunteer opportunity.

Note: Whether or not the skills are required is not a factor. They just need to be associated with the volunteer opportunity.

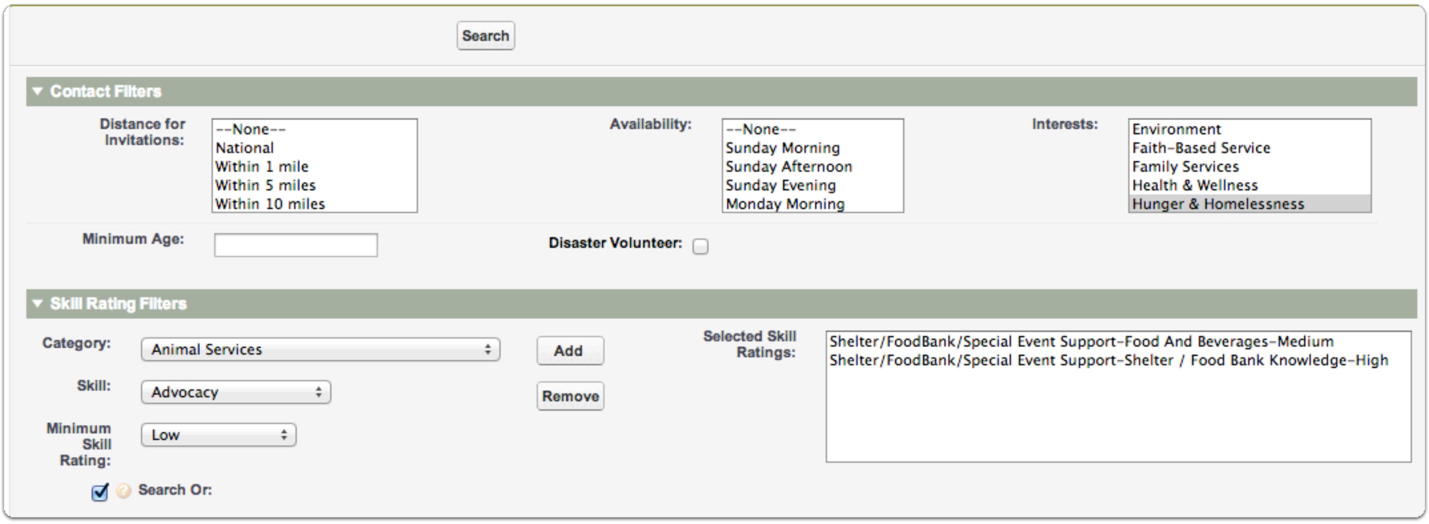
To launch a skilled volunteer search, click on the Skilled Volunteer Search button at the top of the record



The Skilled Volunteer Search is a 'quick action' in Lightning (and must be added to the page layout if you are not using the advanced volunteer opportunity page layout)



This will open a new window for creating the search parameters

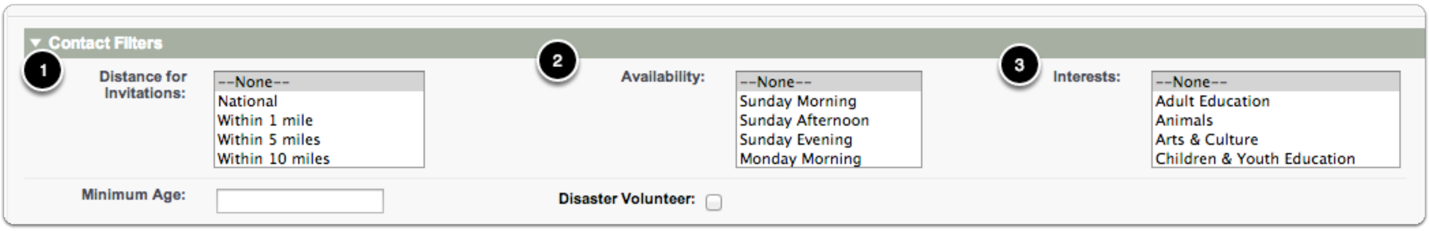


By default, the "Interest Area" associated with the opportunity will be checked and the Skill Ratings associated with the opportunity, as well as their minimum skill level will be selected.

If you click on search now, you will get all records where: 1) The volunteer has expressly indicated in their profile they have an interest in Hunger & Homelessness AND they have at least the required level of either of the two skills associated with the opportunity.

You can however, fine-tune your search as follows:

Contact Filters



Contact filters cut down your search results based on the answers volunteers gave in their personal profile and in the skill-based volunteer profile.

If they have not completed their personal profile and indicated their interests -- then selecting a filter in the 'interests' category - would filter out all volunteers who have not specified the interest in their profile. Selecting a filter on "Availability" will rule out all volunteers who have not completed their availability profile.

As a best practice - we recommend that you set all contact filters initially to 'None" so that you run your search solely on the Skill Rating Filters.

Skill Rating Filters

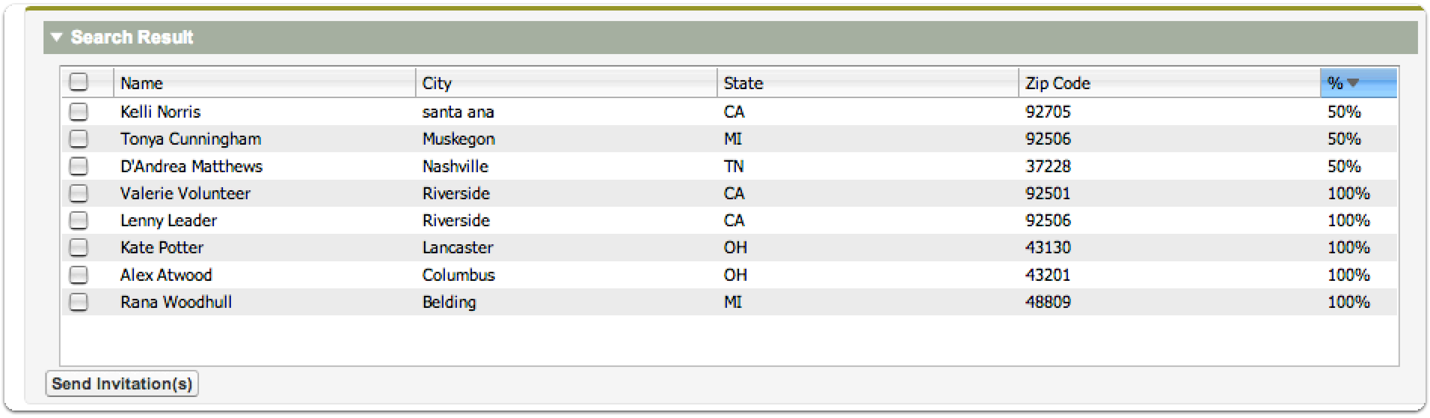
4. You can additional skills to the filters by choosing the category, skill and minimum skill rating and then clicking the ADD button.

If you wish to 'weaken' the skill rating of an existing skill, first REMOVE the existing skill, and then ADD it with a different skill rating.

5. By default, the search will result in anyone who matches any of the selected skill ratings. To get an "AND" search where all skills must be present, uncheck the "Search Or" box.

6. Click on the Search Button to run the search using all the specified contact and skill rating filters.

Search Result Screen


Search Result

Name	City	State	Zip Code	%
Kelli Norris	santa ana	CA	92705	50%
Tonya Cunningham	Muskegon	MI	92506	50%
D'Andrea Matthews	Nashville	TN	37228	50%
Valerie Volunteer	Riverside	CA	92501	100%
Lenny Leader	Riverside	CA	92506	100%
Kate Potter	Lancaster	OH	43130	100%
Alex Atwood	Columbus	OH	43201	100%
Rana Woodhull	Belding	MI	48809	100%

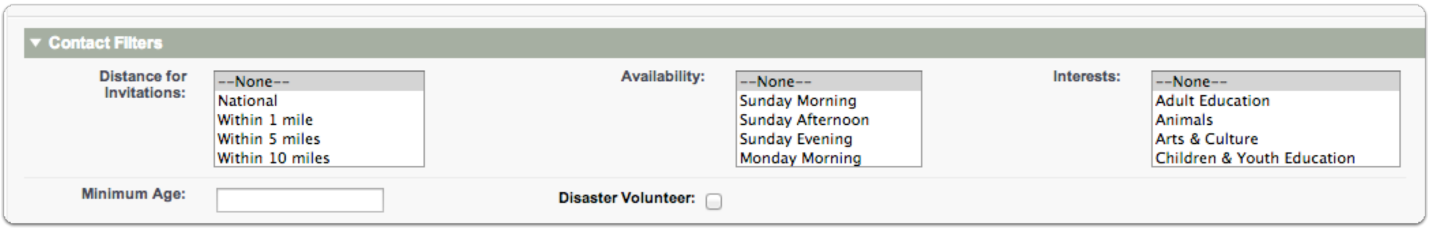
Send Invitation(s)

The search shows us volunteers who matched the search parameter.

The % column tells us how closely they matched the search parameters (based on number of skills they matched on.)

If you get too many search results, you can then apply additional filters to the contact record to hone down the

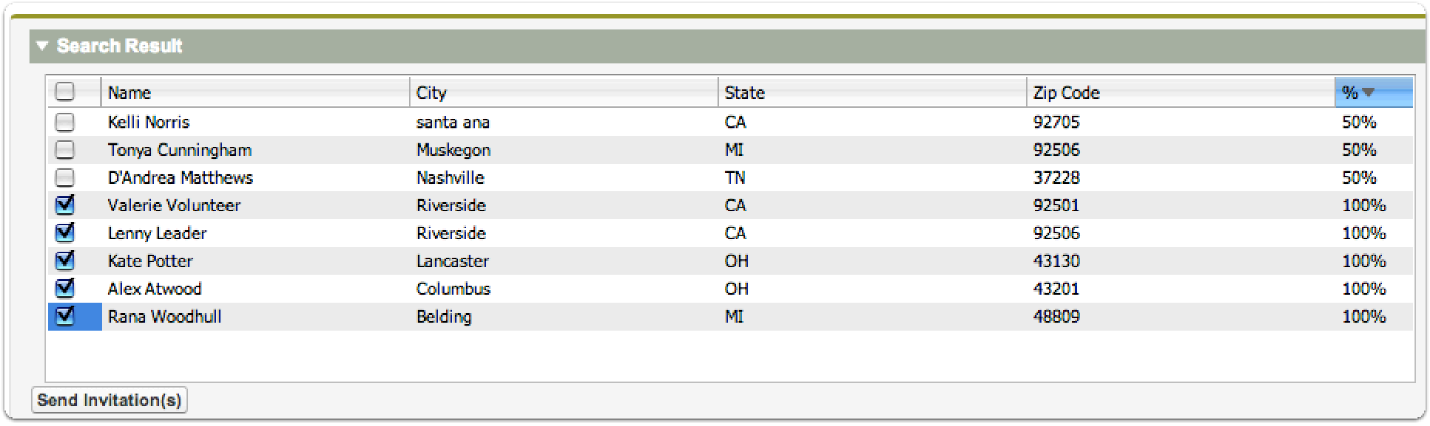
list



Now you could set a minimum age, or look for only people who indicated they were a disaster volunteer, etc.

All the filters in this section are AND filters, so each filter you add will limit the search results a bit more.

Sending invitations to volunteers



Search Result

Name	City	State	Zip Code	%
Kelli Norris	santa ana	CA	92705	50%
Tonya Cunningham	Muskegon	MI	92506	50%
D'Andrea Matthews	Nashville	TN	37228	50%
Valerie Volunteer	Riverside	CA	92501	100%
Lenny Leader	Riverside	CA	92506	100%
Kate Potter	Lancaster	OH	43130	100%
Alex Atwood	Columbus	OH	43201	100%
Rana Woodhull	Belding	MI	48809	100%

Send Invitation(s)

Click on the checkboxes to the left of the volunteers you wish to send emails to, inviting them to look at and sign up for the opportunity. This will send an email pointing them to the opportunity.

Email Sent to Volunteers who are invited


HTML Preview

HandsOn
CONNECT DEMO

Dear Volunteer,

This is an invitation to participate in the opportunity: {!HOC__Volunteer_Opportunity__c.Name}.

We are sending you this invitation because you meet some or all of the requirements to participate in this opportunity.

If you are interested, please check the scheduled dates and times for this opportunity through the link below:

{!HOC__Volunteer_Opportunity__c.HOC__HOC_Domain_Name__c}HOC__Volunteer_Opportunity_Details_Page?&id={!HOC__Volunteer_Opportunity__c.Id}

Thanks,
The {!Organization.Name} Staff

The email template sent out is found in HOC Email Templates and is called "Volunteer Opportunity - Invitation To Participate

It can be edited by your system administrator to meet your needs. [See this post on how to edit email templates.]

Skilled Volunteer search is only available to Salesforce users. It is not available in the sharing portal. You can however, if desired, create a report of a partners volunteers and their associated skills, and make it available in the sharing portal.

Virtual Volunteer Opportunities

What is a Virtual Volunteer Opportunity?

Most Volunteer Opportunities take place in a specific location and the volunteer is told to arrive at that location for a designated time period (the duration of the occurrence). "Show up at the Food Bank at 6:00 pm on March 30"

But what about Volunteer Opportunities you can perform remotely and at your own pace. These are ways to give service from home, your office office, or possibly anywhere you have an Internet or phone connection. These are generally called Virtual Volunteer Opportunities.

In March, 2019, during the Coronavirus pandemic - the interest in virtual volunteering rose sharply. The articles in this chapter discuss Virtual Volunteering, and provide ideas on how to use HandsOn Connect to create and manage Virtual Volunteerism.

What are examples of Virtual Volunteer Opportunities?

There are probably no limits to ways that people could volunteer their time from home or online. The only limit is your imagination in finding ways to meet community needs that do not require a person to be physically present at a specific location.

Here's a list of a just a few types of Virtual Volunteer Opportunities your organization could create and manage:

- Knit blankets or create stuffed toys at home. When completed, send them for distribution to children at local shelters.
- Receive online training and then staff a crisis hot line or phone bank from home.
- Using web conferencing, be available online to mentor students or provide homework assistance.
- Build websites for nonprofit organizations
- Write grant proposals for nonprofit organizations
- Participate in virtual group planning sessions for events
- Create marketing materials or logos for nonprofit organizations
- Manage social media campaigns for nonprofit organizations or events
- Create and manage a blog for an organization
- Raise donations for nonprofits.

Some resources for virtual volunteering ideas

Here are some sites that you can visit to get ideas for virtual volunteer opportunities:

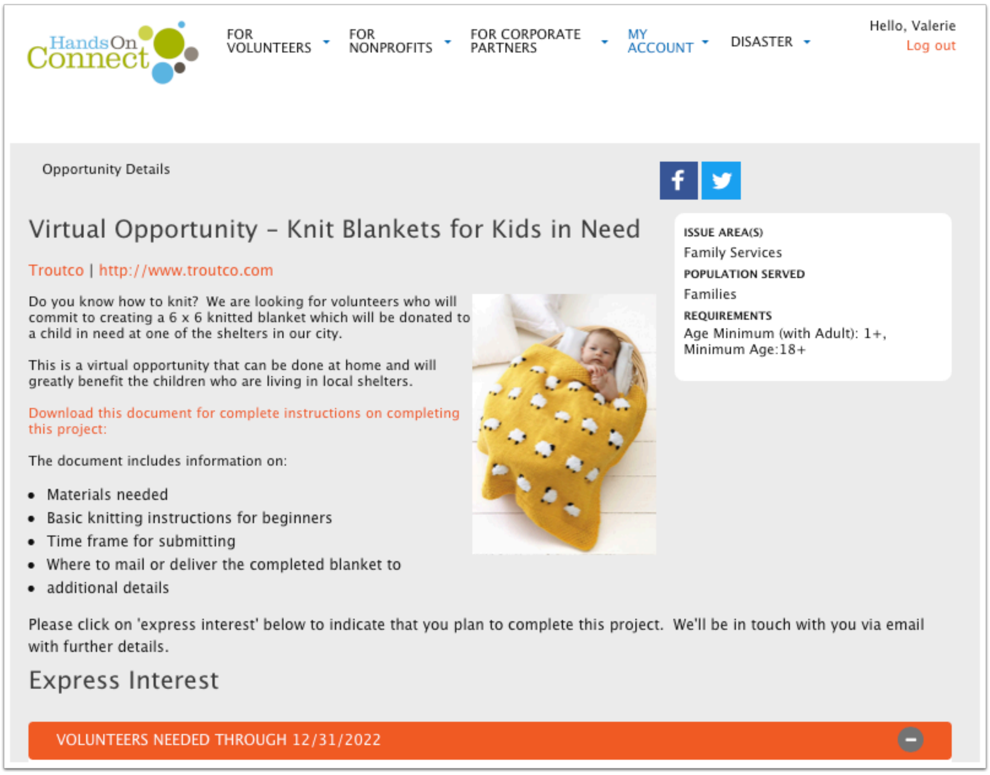
Good Deeds Day

Dreamscape

Catchafire

You can of course, direct volunteers to other sites that promote virtual volunteerism - or you can create and manage your own Virtual Opportunities.

The articles in this chapter will give you some ideas on how to use HandsOn Connect to promote, create and manage virtual volunteers.



(Beta) Virtual Opportunities on the Public Site

Virtual Opportunities are opportunities that take place at "Virtual" Locations. By creating virtual locations and associating them with a Virtual Location, its possible to search for Virtual Opportunities via the /search page, /calendar page, Search Results Blocks, as well as creating a filtered Featured Opportunity Block that only lists Virtual Opportunities.

The "Where" of these opportunities will always include (Virtual) along with the location name.

Participating in this Beta requires us to upgrade your instance of SF and your public site. If you wish to start using this new feature, please open a support ticket and request 'Upgrade us to Virtual Opportunities". By default we will activate this in both Salesforce (Volunteer Opportunity Wizard) and for your partners and volunteer leaders in the Sharing Portal.

If you only want this in SF (admin access), and NOT in the sharing portal - please state that in your request to activate Virtual Opportunities.

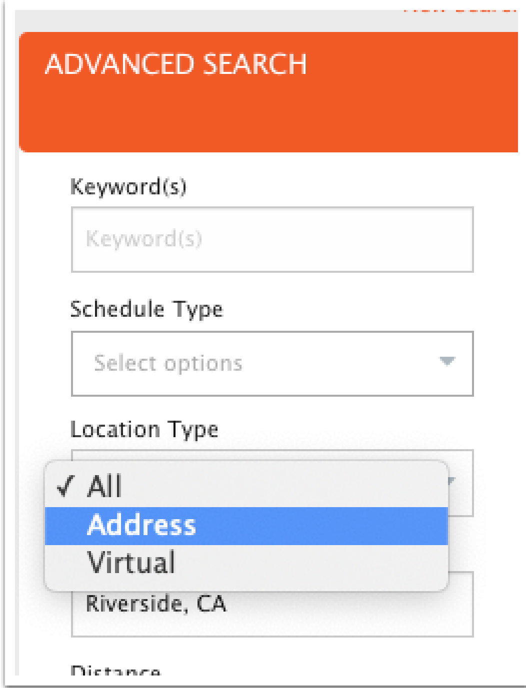
There are now two types of location records in HandsOn Connect:

1) **Address** (this is the default, and represents any location that has an address and/or can be located on a map)

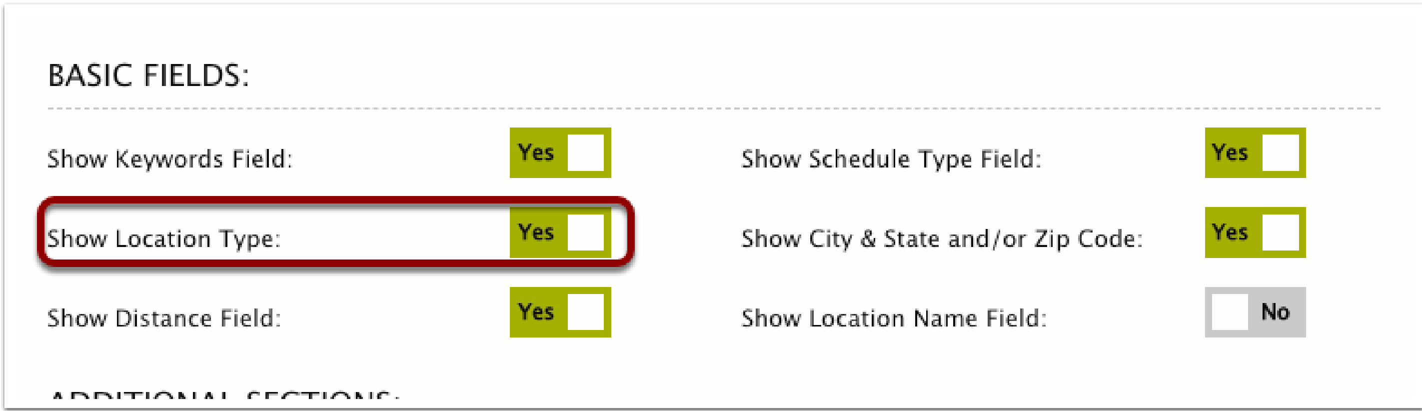
2) **Virtual** (This is a 'location' that is designated as virtual - meaning it doesn't take place at a physical address). A virtual location may be your home, a virtual meeting taking place in a web conferencing app, a streaming site, etc.). A virtual location is any location that you don't physically have to arrive at in order to participate.

Searching for Virtual Locations on /search page

There is now a "Location Type" field that allows you to filter between Location Types (Address or Virtual). You can save searches if you want to have a permanent URL for just Virtual location types (which are, of course, Virtual Opportunities and/or Occurrences). By default the location type is set to 'All"

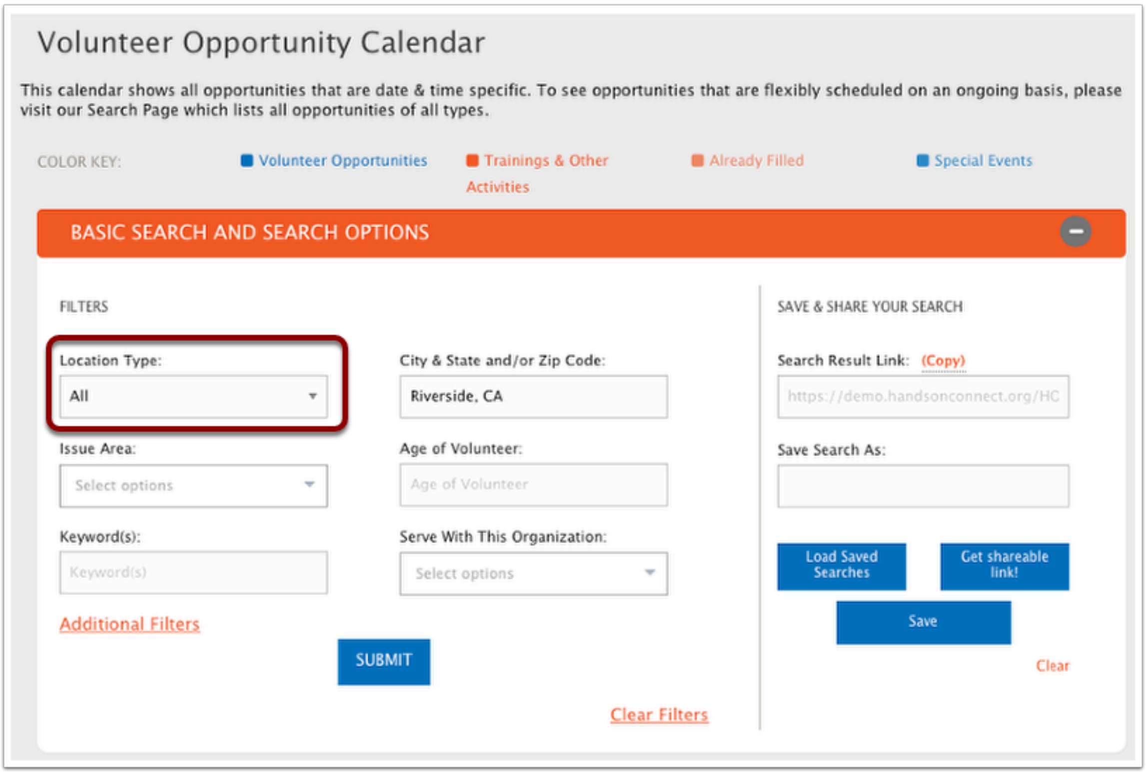


To make this available in search, go to CMS / Blocks / Advanced Search and activate "Show Location Type"

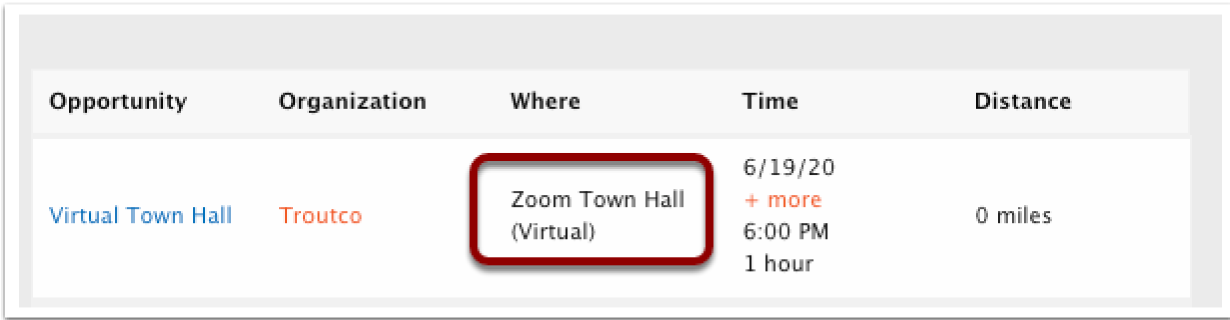


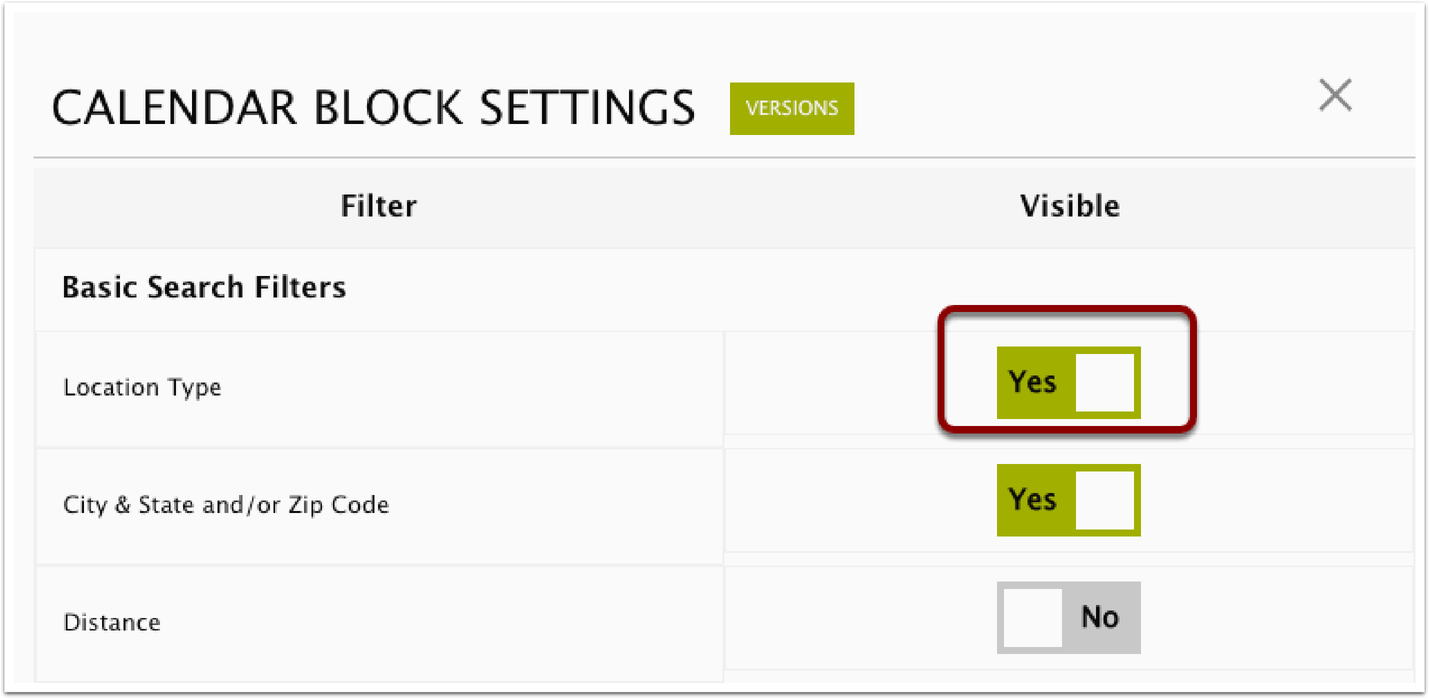
Searching for Virtual Locations on /Calendar Page

You can optionally add "Location Type" to the Basic Search options in the Calendar page by activating this filer. Go to /calendar page, edit, and select "Location Type".



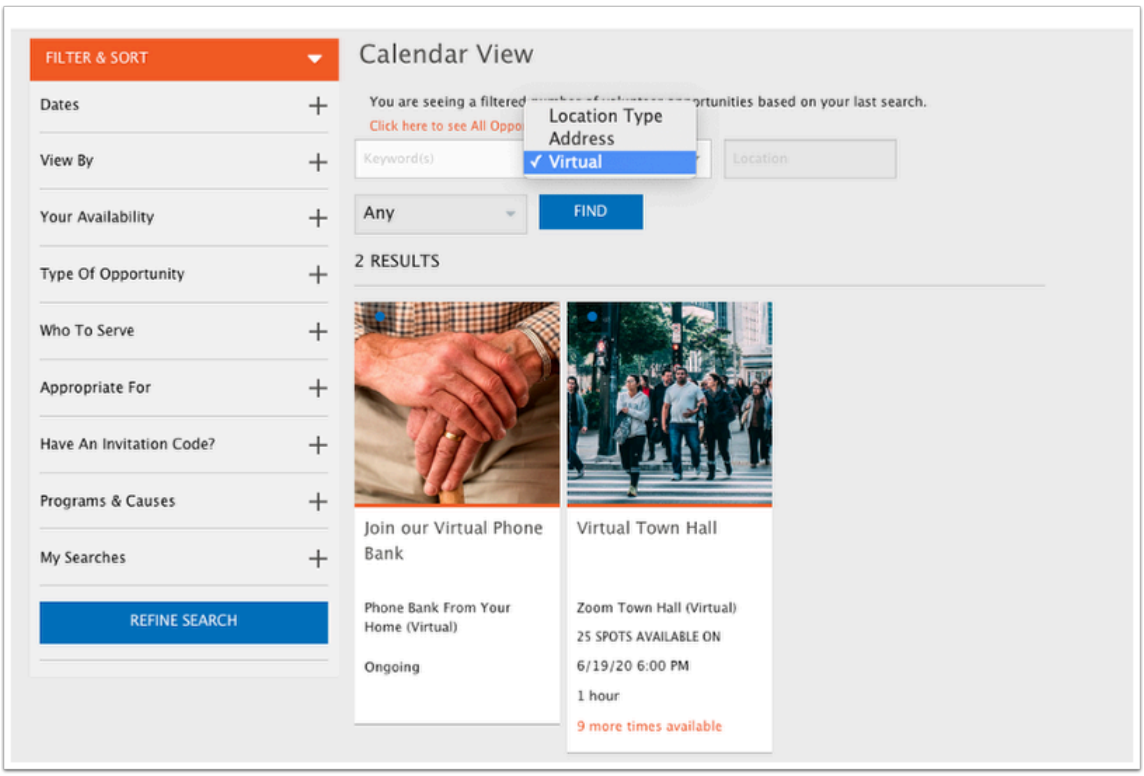
In the search results, the Where column will display the Location Name and (Virtual) in the "Where" column.

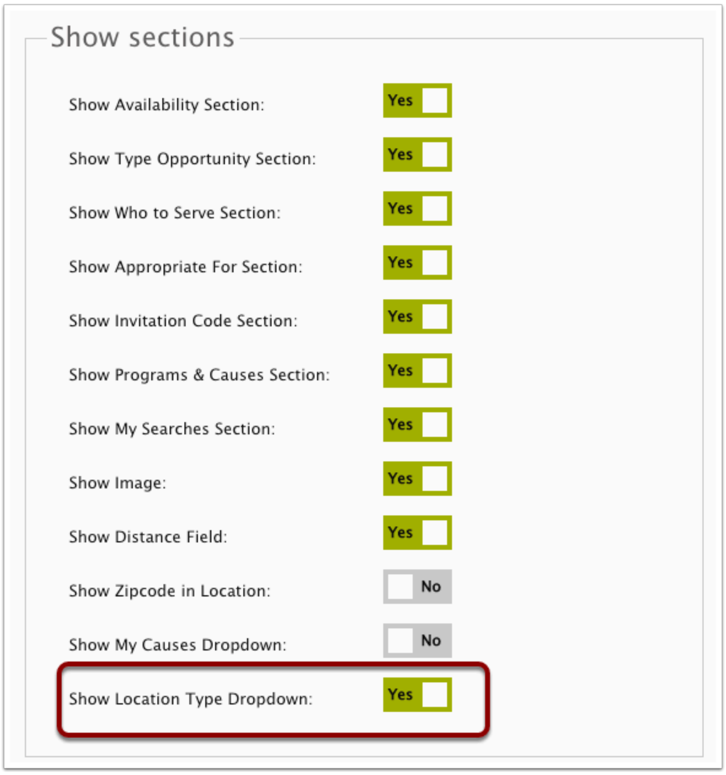




Searching for Virtual Opportunities in a Search Result block

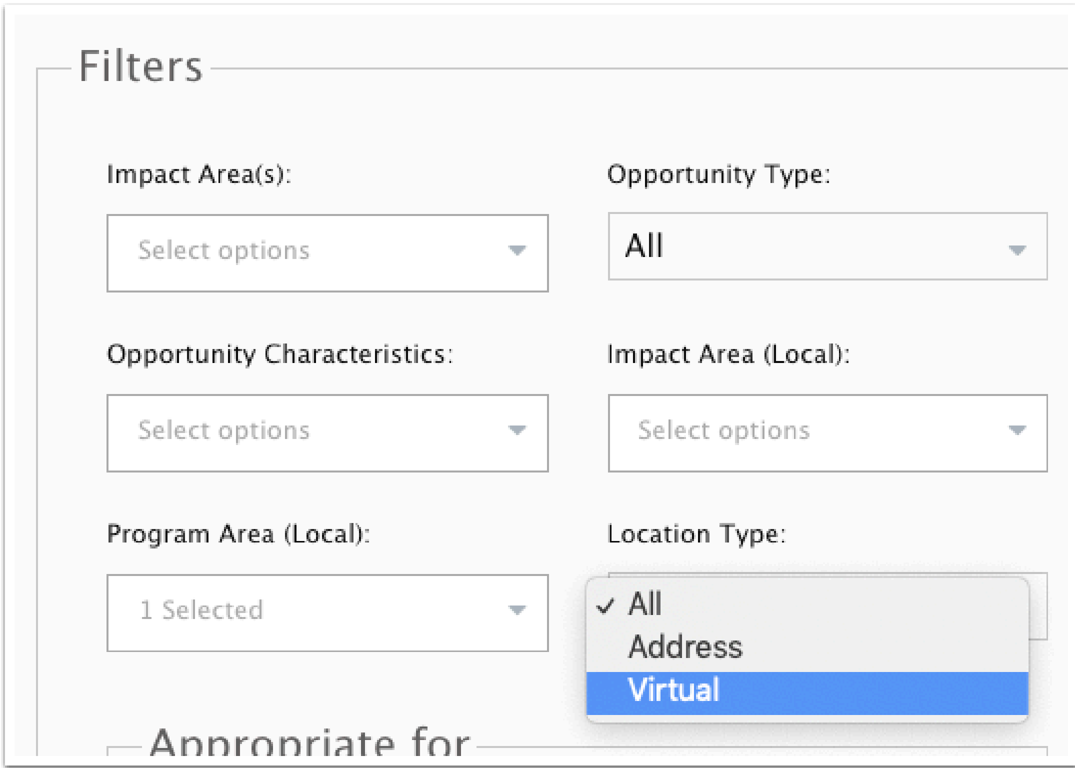
You can optionally add a filter to a search Results block, which makes it possible to search by location type, Address or Virtual. If unselected, opportunities at all types of locations are returned in search. Activate this by editing your search results block and choosing "Show Location Type Dropdown" from the Show Section options:

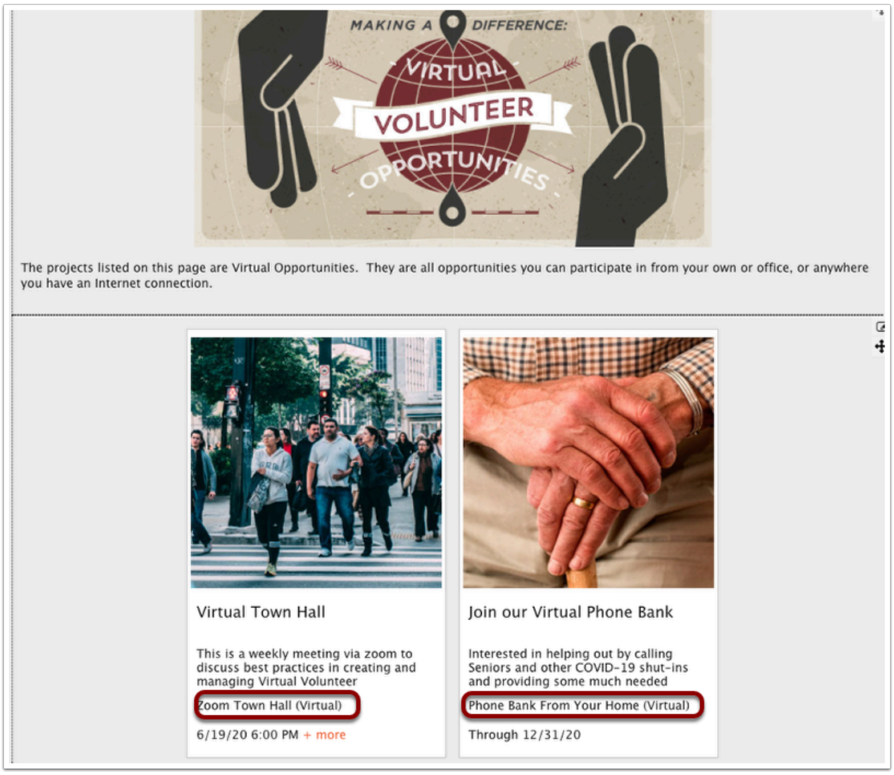




Featured Opportunity Block

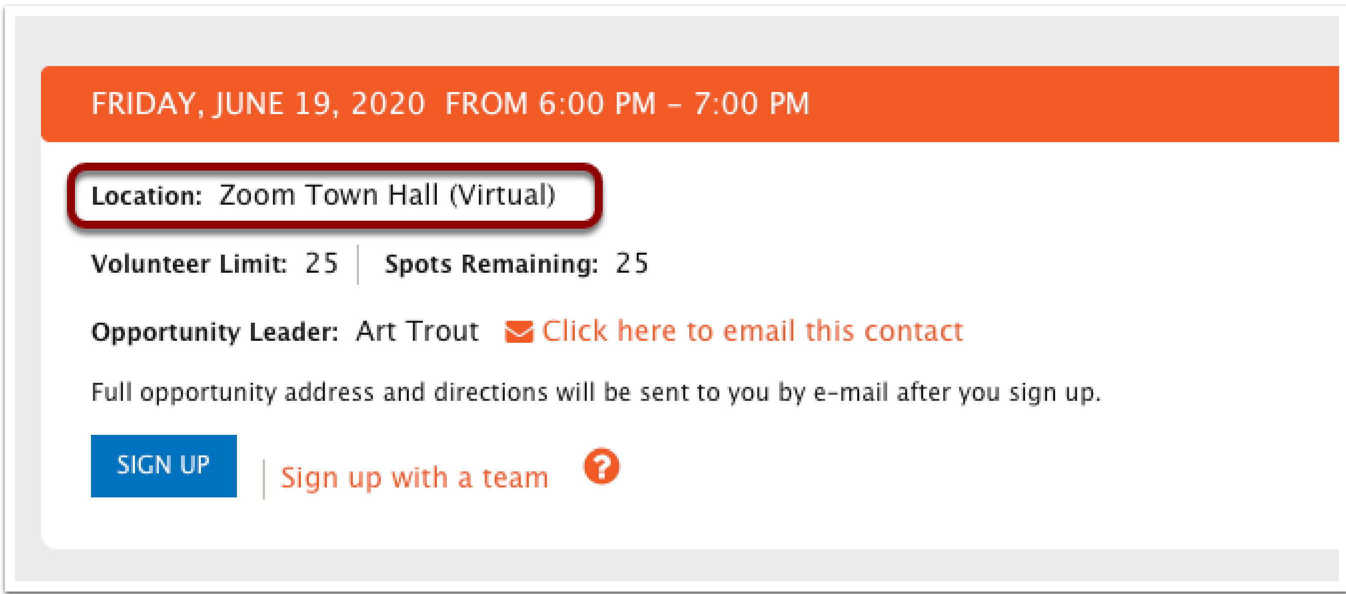
The featured opportunity block can be filtered to only display Opportunities / Occurrences that take place at Virtual Locations:





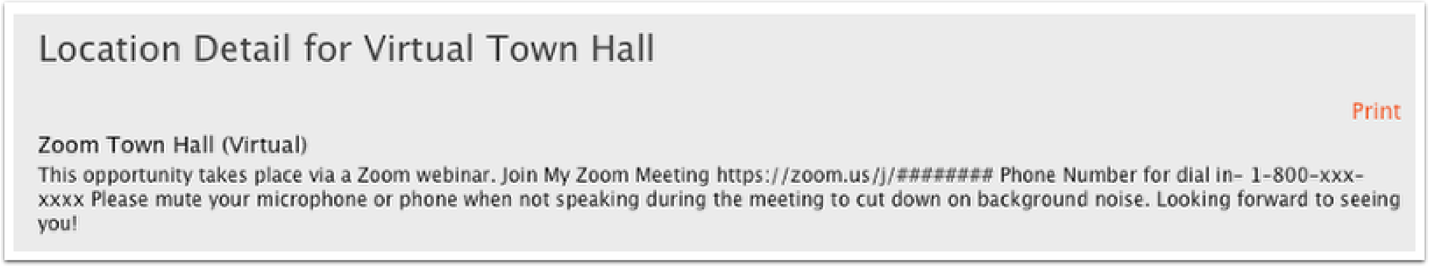
Opportunity Detail Pages

Opportunity Detail Pages will display the location as [Location Name] (Virtual) making it clear that its a virtual location.
Maps will not be displayed for Virtual Locations



Special Directions can be viewed in /My Account / Overview

As with all locations, volunteers can click on the "Location" link for their Upcoming Opportunities to see the special directions associated with their Virtual Opportunity:



Related Articles

Be sure to view these related articles for additional information on working with Virtual Locations:

[Creating Virtual Locations for Virtual Opportunities/Occurrences in HOC Salesforce]

[Virtual Locations for Virtual Opportunities in the Sharing Portal]

[Sharing Virtual Opportunity Special Directions with Volunteers.]

(Beta) Creating Virtual Locations for Virtual Opportunities/Occurrences in HOC Salesforce

Effective June 18, 2020 HandsOn Connect is implementing new functionality to create Volunteer Opportunities and Occurrences that will be searchable as **Virtual Volunteer Opportunities.**

Virtual Opportunities and Occurrences will be defined by their taking place at a new type of location: A virtual location.

This article describes how to create Virtual Locations, which will then be searchable as virtual opportunities via the public site.

For anyone using HOC prior to June 18, 2020. You'll need to open a support ticket and request that this feature be enabled for your organization.   By default, we will turn it on in both Salesforce and for your Sharing Portal.

If you do not wish this activated for your partners in the sharing portal (but available in SF) please specify this.

Also, if you wish to have the success page for ISO-EIO updated to show the location info (see this article, Option 2), include that in your request.

What defines a Volunteer Opportunity and/or Selected Occurrences as Virtual?

Virtual Opportunities are those that take placer at a Virtual location.
Locations In HandsOn Connect can now be defined as one of two types:

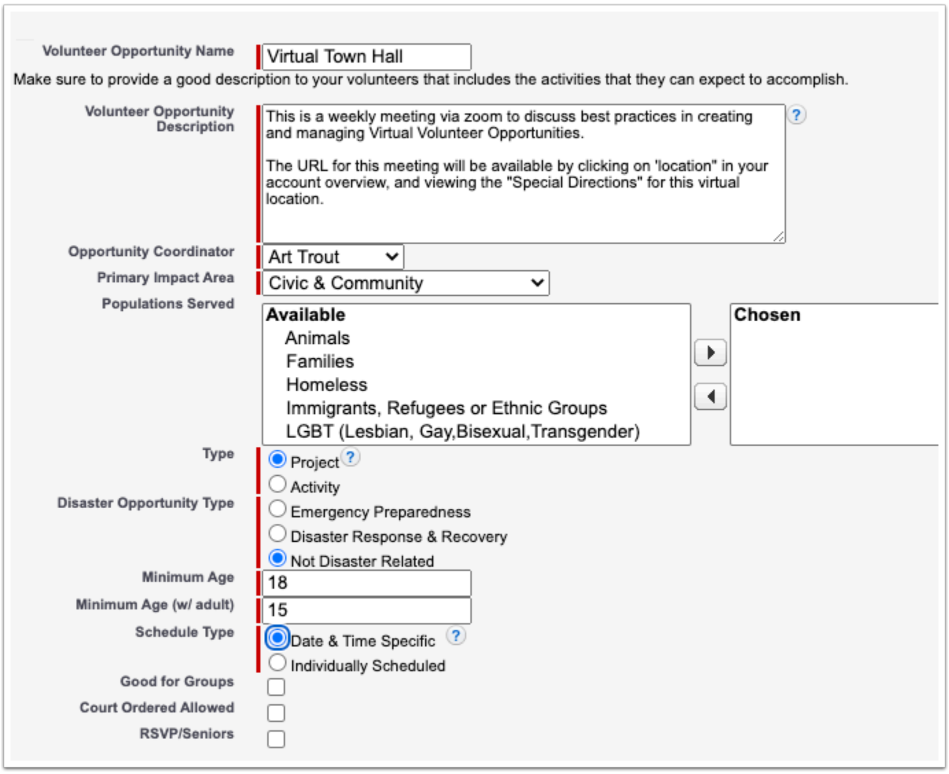
1) **Address** (this is the default, and represents any location that has an address and/or can be located on a map)

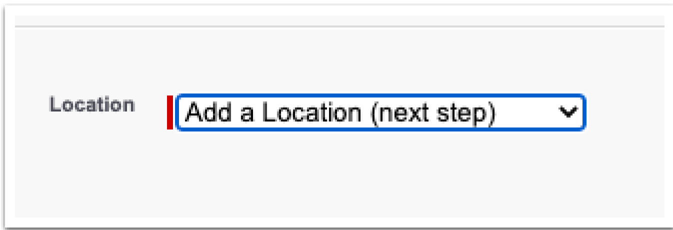
2) **Virtual** (This is a 'location' that is designated as virtual - meaning it doesn't take place at a physical address). A virtual location may be your home, a virtual meeting taking place in a web conferencing app, a streaming site, etc.). A virtual location is any location that you don't physically have to arrive at in order to participate.

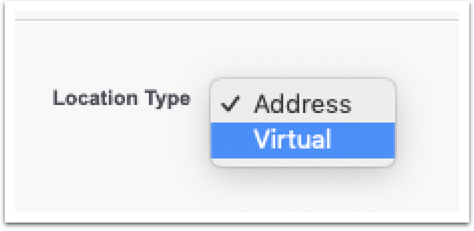
Creating a Virtual Location using the Volunteer Opportunity Wizard in Salesforce

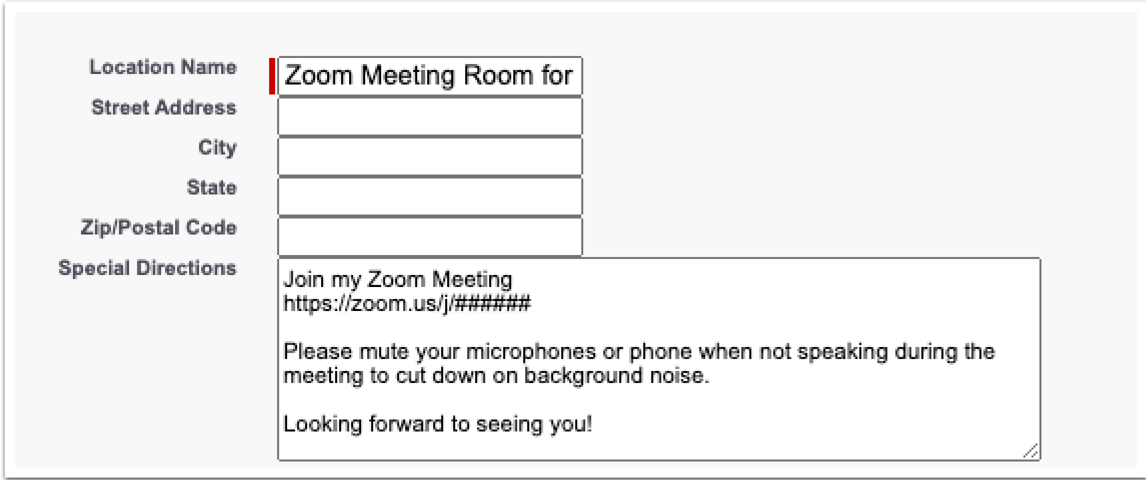
When creating a Volunteer Opportunity, select "Create New Location". After doing so you will see the option to select the Location Type. For regular physical locations leave the default as address. For Virtual Opportunities choose "Virtual" as the location type.

- Use the Special Directions field in the location to give instructions on how to participate in the Virtual Opportunity. This field can be used for any information relevant to participating in the virtual opportunity that you don't want to make available in the opportunity description. (so that only those signed up for the opportunity can see the URL for online participation or additional instructions.









NOTE: For Virtual locations, the street address, city, state and zip are not required and can be left blank. You can optionally fill this info in, but it will have no effect on search results.

Converting existing occurrences to 'Virtual"

If you have previously created VIrtual Opportunities and wish to convert them to the new format (for ease in search, feature opportunity blocks, etc) simply do this:

- Edit the existing location of the opportunity
- Change the location type field from "Address" to "Virtual".

It will now appear as Virtual on the public site.

What about Express Interest Only opportunities?

Some organizations have created Virtual Opportunities as Individually Scheduled Opportunities - Express Interest Only with No location.   This is still an option and you don't need to convert these if you don't want to.   They won't however, show up automatically as Virtual Opportunities in the search mechanisms (unless you have already implemented a way to search for them using tags or saved searches).

You can however, convert these to the new format by creating a new virtual location (or using an existing virtual location), and associating the Occurrence of your Virtual ISO - EIO opportunities to use a virtual location.

Special Directions access for Express Interest Only Opportunities

So now if you are making Individual Scheduled Opportunities - Express Interest Only (ISO-EIO) opportunities virtual by associating them with a virtual location (the easiest way to include them in Virtual Opportunity searches), you may be wondering exactly how the volunteer will get to see the Special Directions info for that Virtual Opportunity.

See this article for the options you can employ to share the Location info (Special Directions) for Virtual Volunteer Opportunities.

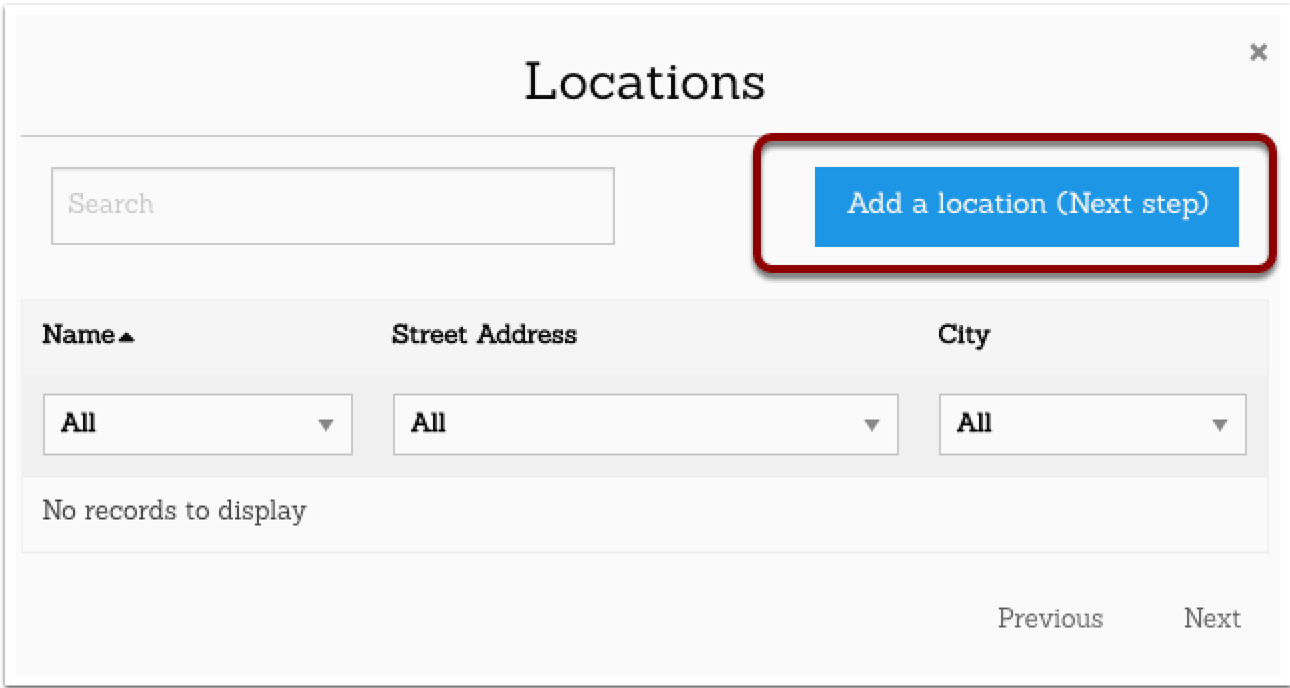
(Beta) Virtual Locations for Virtual Opportunities in the Sharing Portal

It's now possible to create Volunteer Opportunities and Individual Occurrences that are considered "Virtual". This means that the opportunities don't take require volunteers to go to a physical address, but instead they are able to volunteer and participate from home, remotely, or online.   Here's how to designate an opportunity, or individual occurrences of a date and time specific opportunity as Virtual Opportunities.

This is an optional feature that may or may not be available in your version of the sharing portal. If its not available, please contact your system administrator to discuss making it available to you.

Virtual Opportunities are defined by creating a Virtual Location

When Creating a Virtual Opportunity, you will choose, or create a location, that will be designated as a "Virtual" location. To create a new virtual location, click on "Add a Location" when choosing the location for a new Volunteer Opportunity.

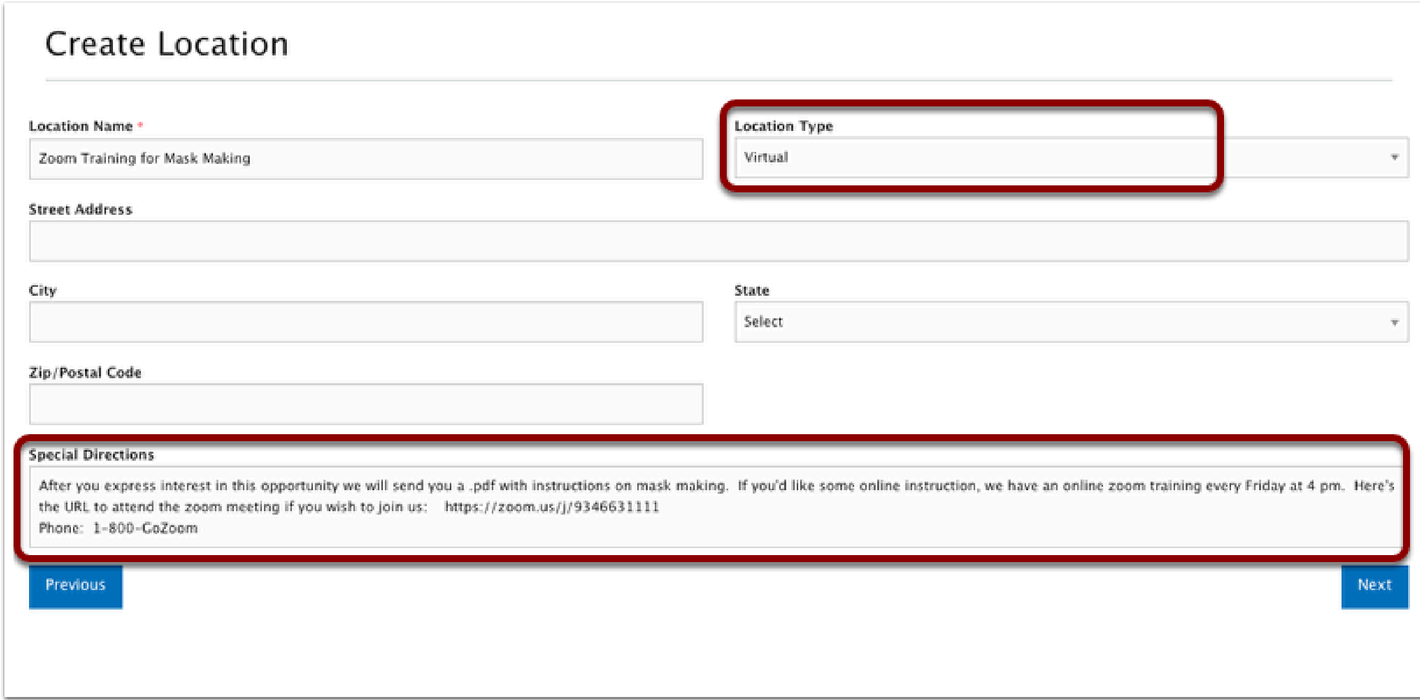


When you arrive at the Create Location Screen, you will see a new field "Location Type". By default it will be set to "Address" - which is the normal type of address used for most volunteer opportunities.

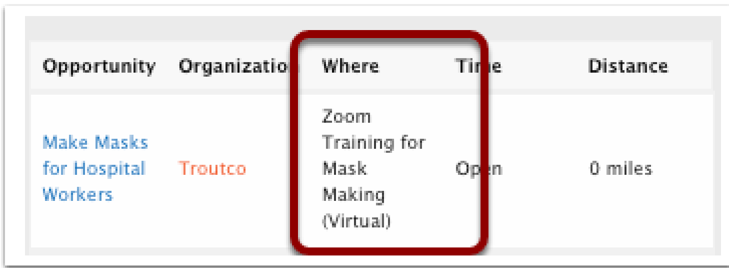
If this is a Virtual Opportunity choose Location Type = Virtual.

When do you so, the Street Address, City, State, and Zip Code will no longer be required. Leave them blank.

Put any info about how to participate (online URLs, etc) in the Special Directions field.

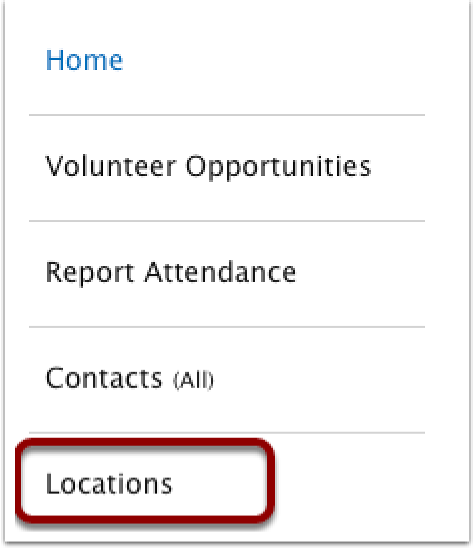


Opportunities taking place at Virtual Locations will be identified as such on the public site, and volunteers can filter search to find Opportunities with Virtual Locations, which will always be automatically have the term (Virtual) in the Where column of search results.

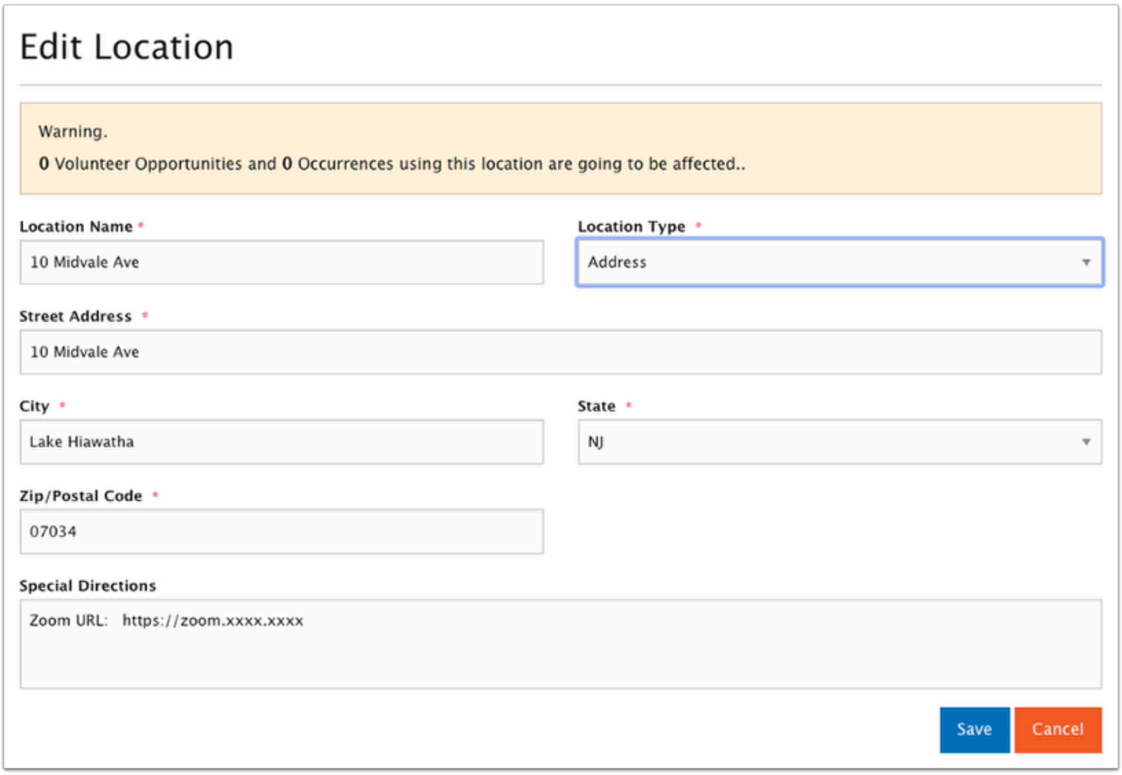


Editing existing locations to make them virtual

Click on the Locations item in the left menu if its available in your sharing portal



Select an existing location and click on 'edit'.
Change the 'location type' field from address to 'virtual'. Add Special Directions related to the Virtual Opportunity



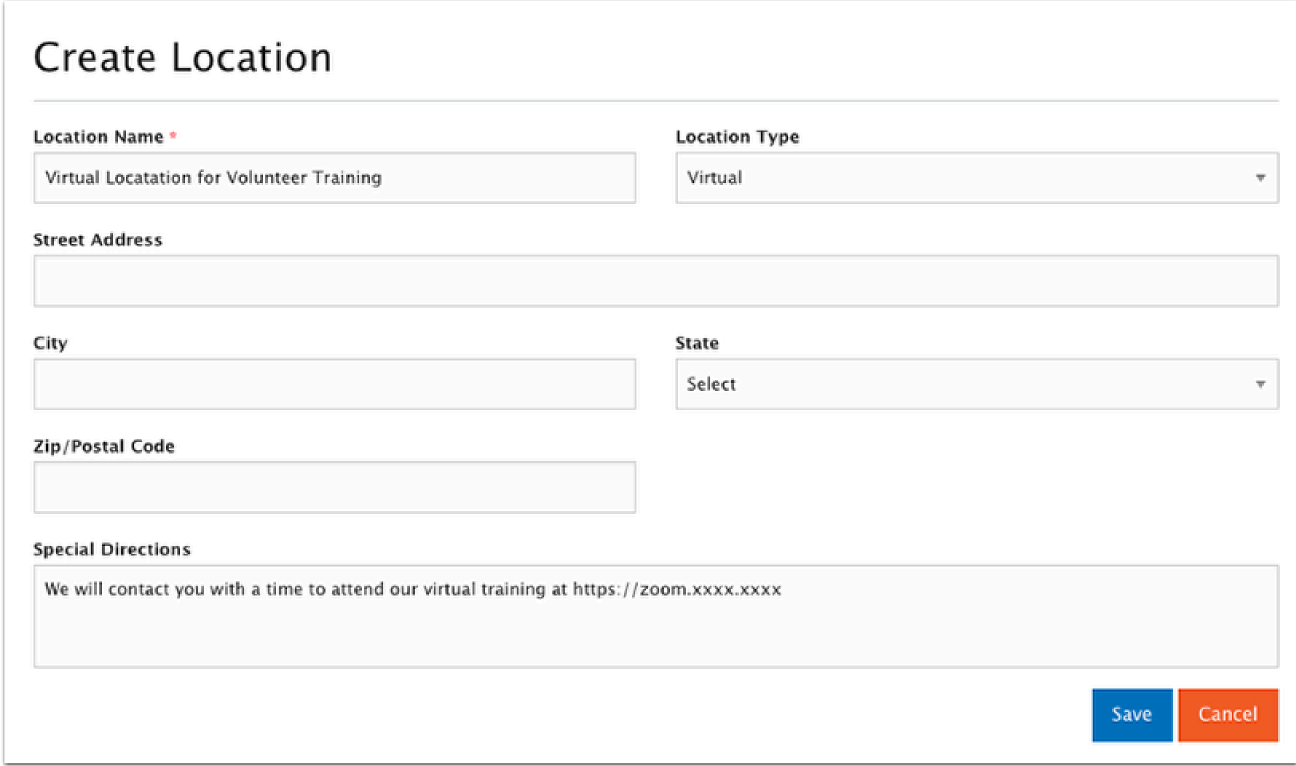
Creating a new location for an existing Volunteer Opportunity that had no location

If you previously created a Virtual volunteer Opportunity that was Individually Scheduled - Express Interest Only and didn't give it a location, you might now want it to appear in search as a Virtual Opportunity. To do this:

1) Create a New Location (go to Location Menu on left, and click on "Create Location"

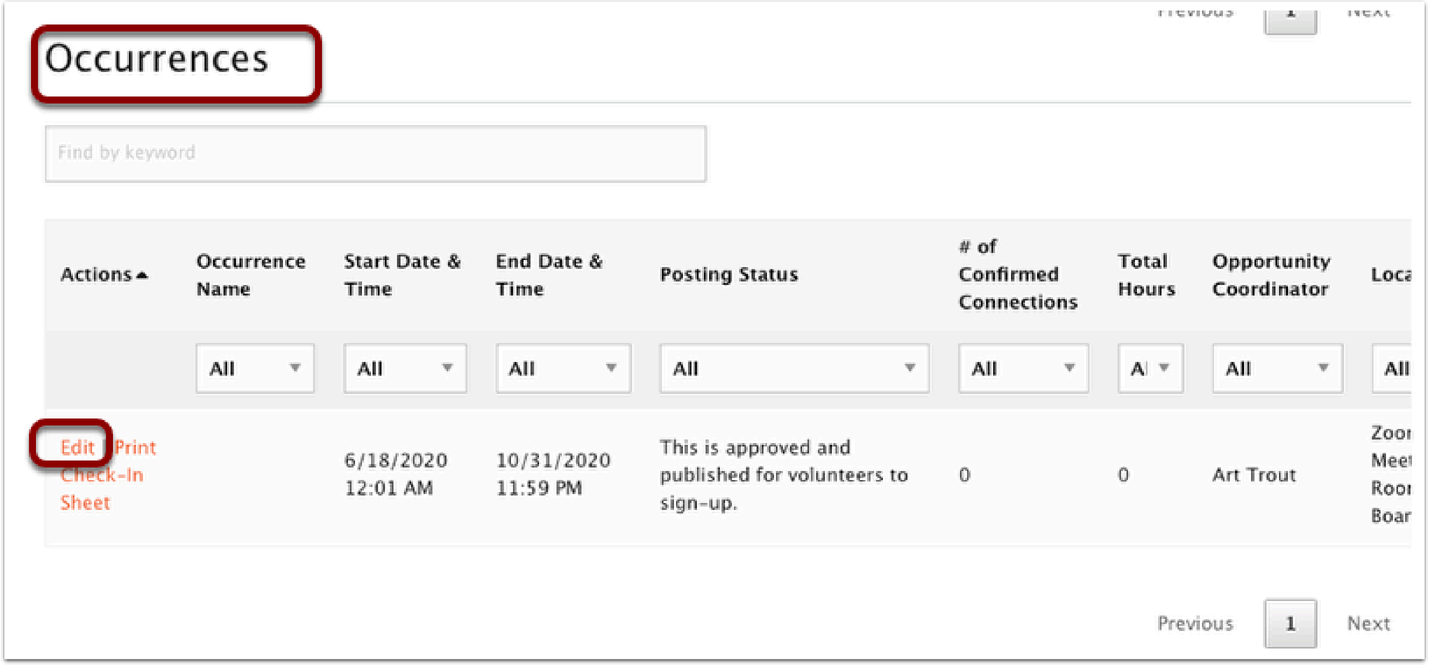
2).Create your new location, with Location Name, Location Type = Virtual, and Special Directions.

3). Save that location.

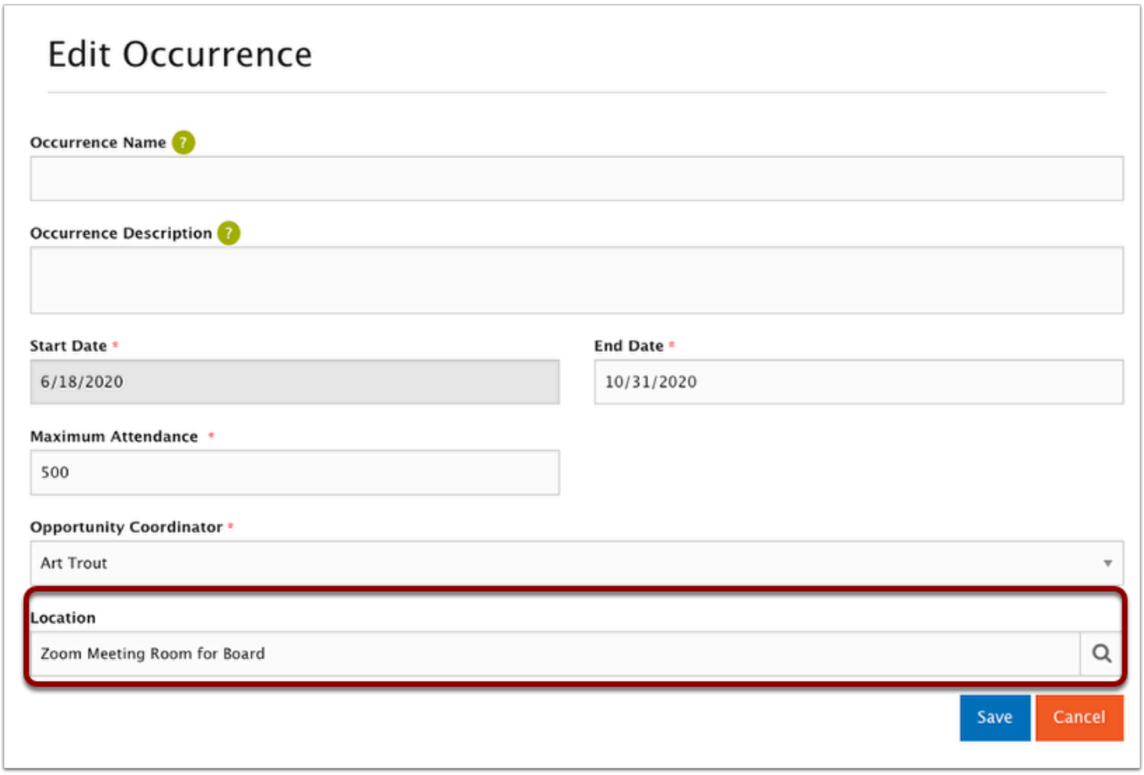


4. Go to the Volunteer Opportunity record you wish to now associate your virtual location with.

5, Go to the Occurrence table and select edit for the Occurrence Record. (This is where the location gets populated)



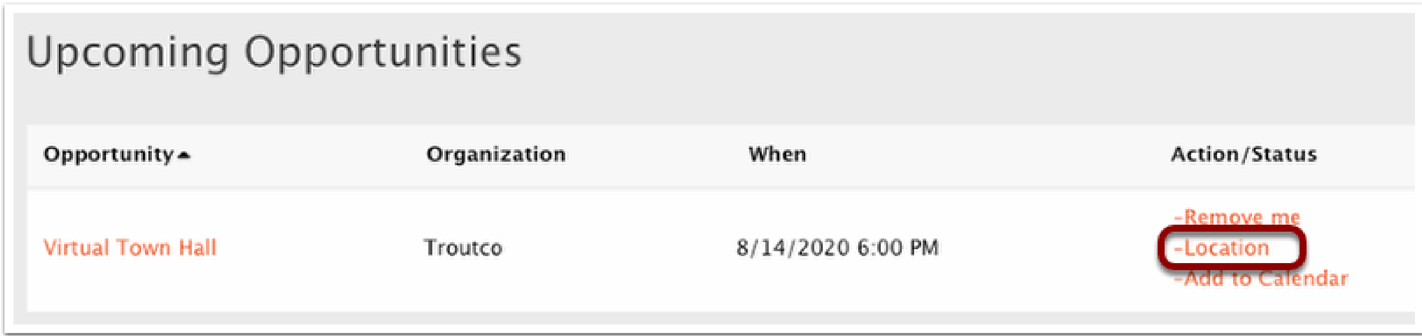
6. In the Location Field, search for your virtual location and populate it in the location field. Save the edited occurrence.



(Beta) Sharing Virtual Opportunity Special Directions with Volunteers

How do volunteers see the special directions associated with a Virtual Location?

Once a Virtual Location has been created and published, volunteers who sign up and have a confirmed connection for that opportunity will be able to see the special directions for the virtual opportunity by clicking on the "Location" link in their account overview:



A link to this location page is also included in all emails sent when a connection has been confirmed by the Opportunity Coordinator.

Options for sharing virtual locations for ISO-EIO opportunities

Individually Scheduled Opportunities - Express Interest Only (ISO-EIO) opportunities present a bit of a problem, because in most cases, connections to ISO-EIO do not get confirmed.

You can only confirm a connection IF you schedule that volunteer for a specific start and end time for the connection. And many virtual opportunities are open-ended (i.e. Sew Face Masks and donate them), and so the connection does not get confirmed.

Only connections with start date and end date appear in the Volunteer's account overview section. So for EIO opportunities that do not get confirmed (because they do not have a specific date), how can you communicate the Special Directions for this type of Virtual Opportunity.

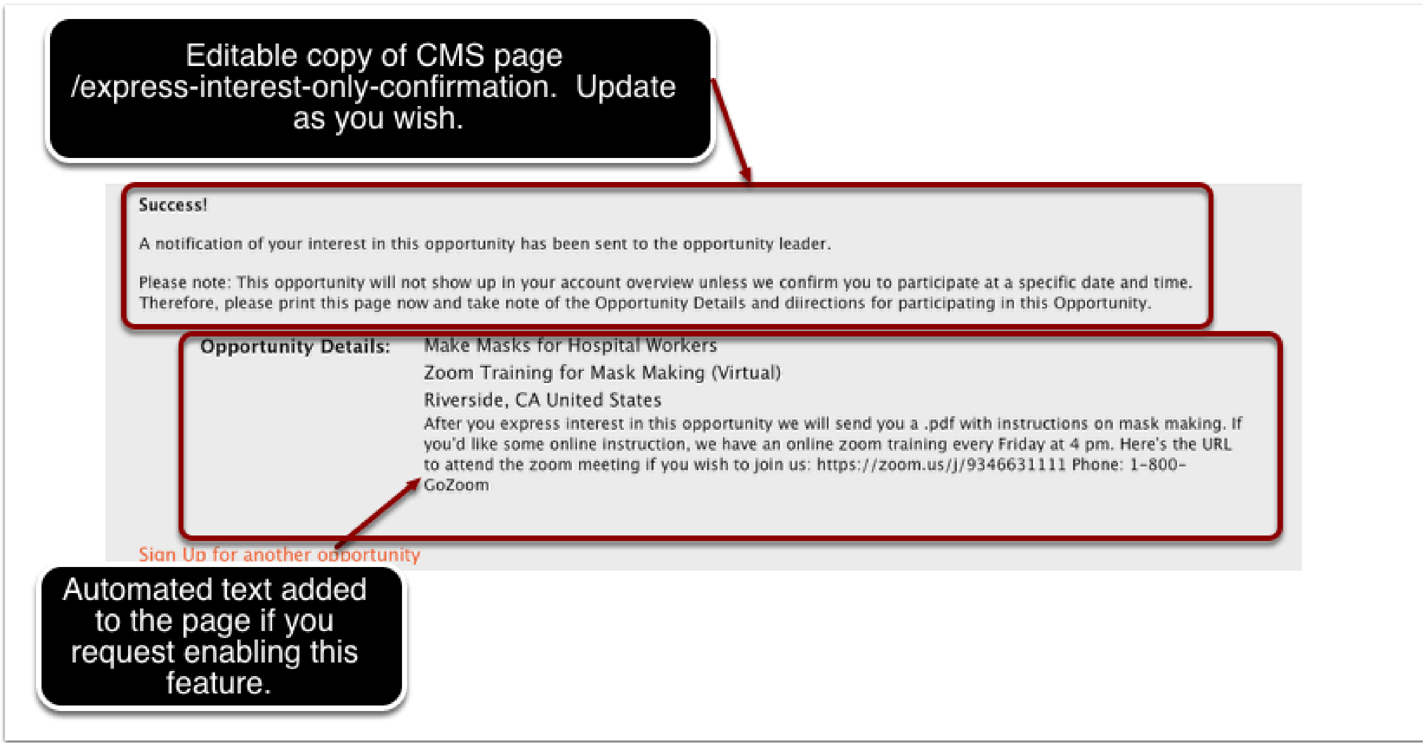
There are several ways to accomplish this -- and this is a choice each organization can make based on their business practices regarding ISO-EIO opportunities.

Option 1: Add the special information to the Opportunity Description

This has been many organization's practice regarding Virtual ISO-EIO opportunities. It puts the info right out front before the volunteer even expresses interest.   That however, is only the disadvantage, as a volunteer might participate without ever expressing interest and creating a connection.

Option 2: Have the special directions appear on the Success Page for ISO-EIO opportunities

An option has now been added to the Success Page for ISO-EIO opportunities, to display the Special Directions after a connection has been made.   The location will automatically, on the page / express-interest-only-confirmation display the contents of that page as you've defined it in the CMS, AND show the location information.



Keep in mind that if you use this feature, then the location info will be displayed for ALL ISO-EIO opportunities. If you only wish to share the Virtual Opportunity Special

Directions with SELECTED Opportunities, and only to some volunteers (i.e. those you choose to notify to participate), then this is not your best option. See Option 4 below.

This feature is not enabled by default. If you wish Location info displayed on your ISO-EIO Success page -- please open a support ticket and in the subject say "Request Display Location in EIO Sign Up Confirmation Page

Option 3: Place a link to the locations page in the email template sent to volunteers after they express interest

To add a link to the directions page to the email that is sent when volunteers express interest in an ISO-EIO your system administrator can do this:

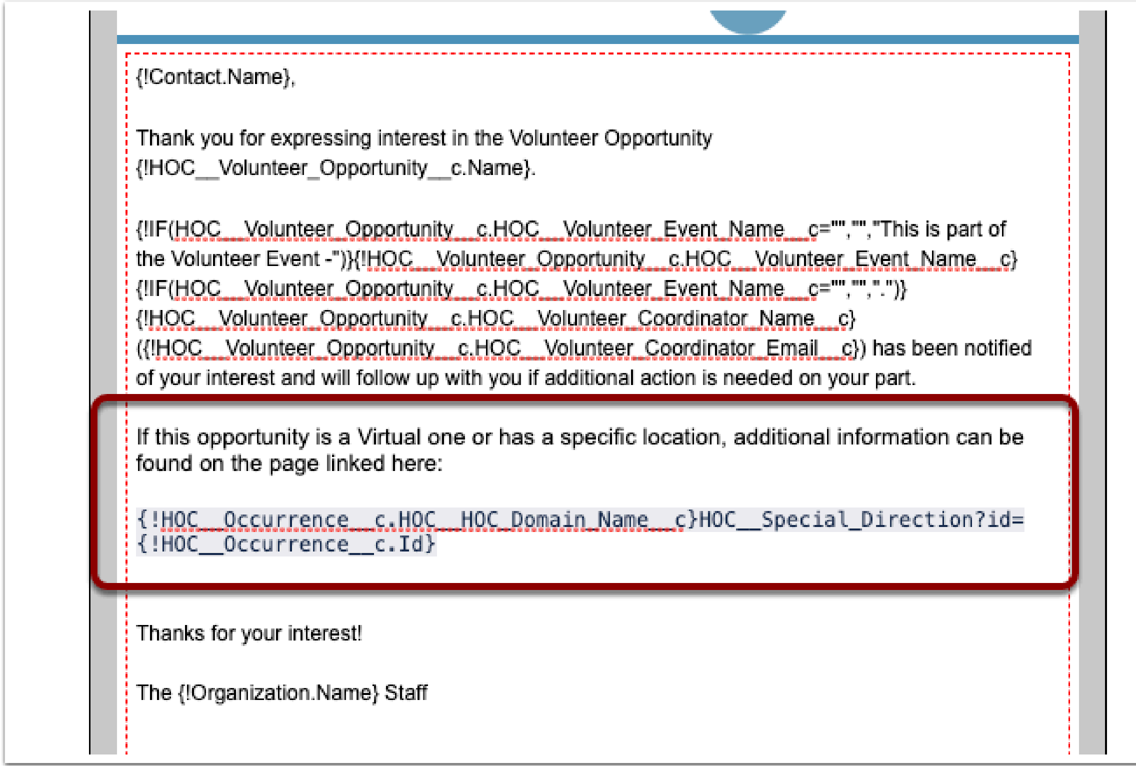
1) Go to Setup / Classic Email Templates and select the email template "Opportunity Sign-up Acknowledgement for Express Interest Only"

2) Click on Edit HTML Version

3) Add text and this merge field to the email template:

```
If this opportunity is Virtual or has a specific location, additional information can
be found on the page linked here:

{!HOC__Occurrence__c.
HOC__HOC_Domain_Name__c}HOC__Special_Direction?id={!HOC__Occurrence__c.Id}
```



This can be used in conjunction with Option 2 above. Note however that this will reveal the location details to everyone who expresses interest in this opportunity. If you only want to share the special directions selectively with some voliunteers who have expressed interest, see Option 4 below.

Option 4: Manually send email with special directions link to volunteers

If you only want some of the volunteers who express interest in your virtual opportunities to get the detailed virtual location information, then you can either:

1) Confirm their connection for a specific date and time (and then they can see the location link in their volunteer overview), or

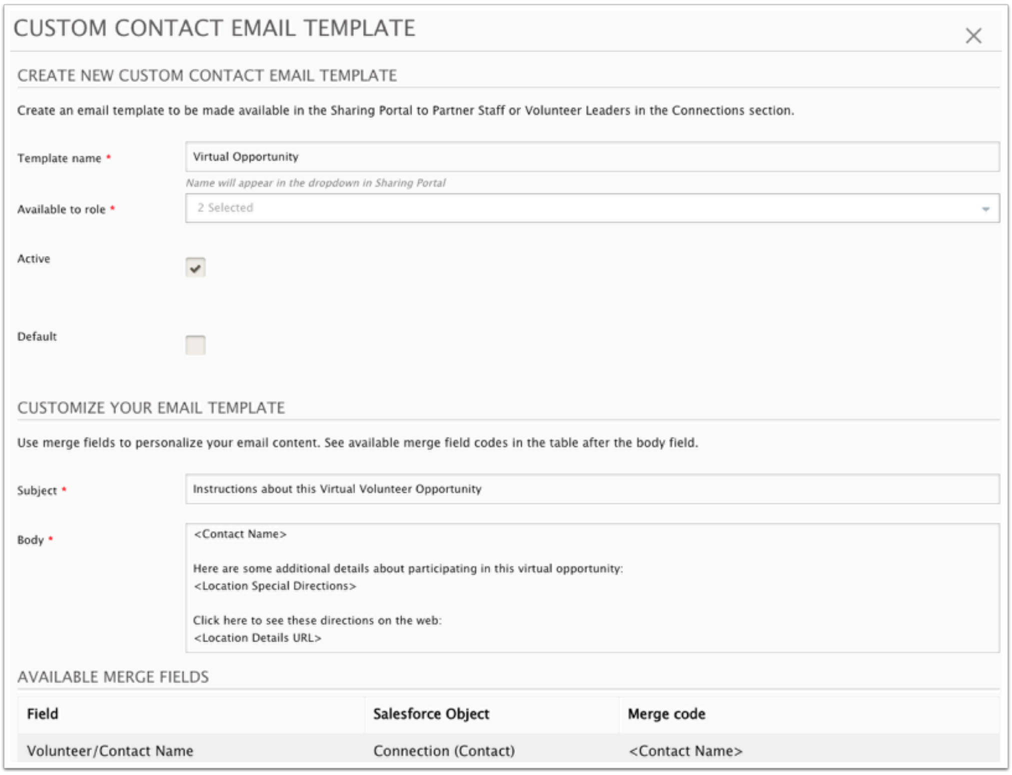
2) Manually send an email, using the connection grid, to share the special directions with Volunteers. To make this option somewhat easier for Sharing Portal Users, System Administrators can use the CMS to create a special email template to use in conjunction with Virtual Volunteer Opportunities.

To do this:

A) Go to CMS / AddOns / Custom Contact Email Templates

B) Click on "Create New Custom Contact Email Template

C) Create a template with a name like "Virtual Opportunity".   You can add merge fields from the Available Merge Fields List. Here's an example of a template that will make it easy to notify volunteers of the details for participating in a Virtual Opportunity.


CUSTOM CONTACT EMAIL TEMPLATE

CREATE NEW CUSTOM CONTACT EMAIL TEMPLATE

Create an email template to be made available in the Sharing Portal to Partner Staff or Volunteer Leaders in the Connections section.

Template name * Virtual Opportunity

Name will appear in the dropdown in Sharing Portal

Available to role * 2 Selected

Active

Default

CUSTOMIZE YOUR EMAIL TEMPLATE

Use merge fields to personalize your email content. See available merge field codes in the table after the body field.

Subject * Instructions about this Virtual Volunteer Opportunity

Body * <Contact Name>

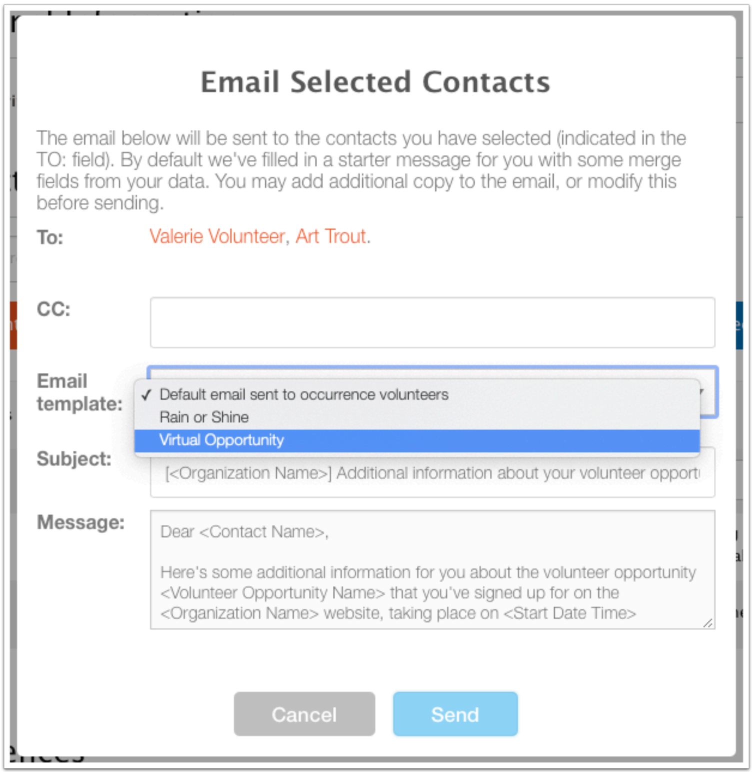
Here are some additional details about participating in this virtual opportunity:
<Location Special Directions>

Click here to see these directions on the web:
<Location Details URL>

AVAILABLE MERGE FIELDS

Field	Salesforce Object	Merge code
Volunteer/Contact Name	Connection (Contact)	<Contact Name>

D) Save your email template and alert your partners that this is available when sending emails. They'll find the template as a drop down option when they choose volunteers they wish to send email to, and like all email templates, they can edit it further and add more info if they like. But the email will contain a link to the Location Details page which they can click on and access.



Administrators can choose to employ Options 1, 2, 3, and/or 4 based on their organizational best-practices regarding their use of ISO/EIO opportunities.

For additional help in administratively updating email templates, etc, please drop in to one of our daily lab sessions and we can walk you through the process!

If you wish Option 2 to be activated - please open a support ticket so we can update your public site with this feature.

A sample Virtual Volunteer Opportunity

The first thing to consider when creating a Virtual Volunteer Opportunity is how you want to manage it.

- Do you just want to distribute information about what to do and how to get involved?
- Do you want to schedule the volunteer to perform or complete the virtual opportunity by a specific date?
- Do you want to track whether or not the volunteer actually completed the virtual opportunity?
- Do you want to award hours of service to the volunteer for their or your own metrics?
- Do you want volunteers to be able to search for Virtual Opportunities on your site, separate from location-base opportunities?

HandsOn Connect offers a lot of flexibility in how you can manage Virtual Volunteer Opportunities. In this series of articles - we'll start with the most basic way to do this, and offer ideas about how to more deeply manage and track virtual volunteerism, if that's your objective.

Let's start with a basic way to list a virtual volunteer opportunity. For this example we'll choose to create an opportunity where volunteers are asked to knit blankets at home, and send them to our Volunteer Center, where we'll then donate them to local shelters.

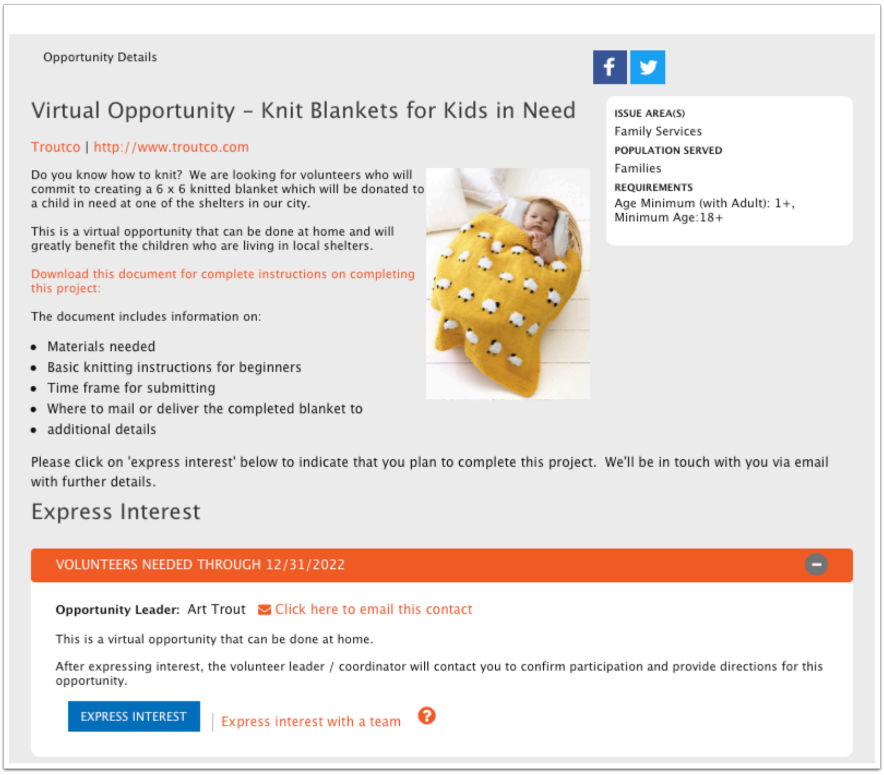
Create a Volunteer Opportunity as Individually Scheduled - Express Interest Only

Individually Scheduled, Express Interest Only opportunities are ideal for Virtual Opportunities. While they do not require a location, we recommend associating them with a Virtual location so they are easily searched for.

Give the opportunity a name that clearly identifies it, and indicates its a Virtual Opportunity.

In the opportunity description, give details on what the volunteer needs to do to complete the project.

For detailed instructions, it might be best to include a downloadable document that includes information on how to complete the project, where to mail or deliver it, and any other relevant details:



How to attach a downloadable file to an opportunity description

There are two ways to upload documents and create links to them for downloading. Storing Files in Salesforce is probably the easiest, but [here's an article explaining both methods. Use the one you find quickest and easiest]() :-)

Managing connections to a Virtual Volunteer Opportunity

The beauty of Express Interest Only opportunities is that volunteers simply express interest, and what you choose to do after that is entirely up to you. You now have a list of interested volunteers with connections that can remain in pending status. If you've given complete instructions on how to do the virtual project - that may be sufficient for your purposes.

You can use the email capabilities of HandsOn Connect to send emails to one (or all) of the people who've expressed interest, and keep in touch with them, provide them with further instructions, or thank them for their service. Just keep the connection as pending, and use email to manage the volunteers.

But what if you want to keep track of which volunteers actually completed the project? What's involved in confirming Express Interest Only connections and marking attendance?

To confirm? Or not confirm?

In order to confirm a pending connection for an Express Interest Only opportunity, you must first update the connection and give it a start date and time and end date and time. When you do this, the volunteer will be notified that they've been confirmed, and given the time their connection takes place. But if the time is open ended, you may just want to leave it in pending status, and communicate with the volunteer via email. If and when they complete the project, then you can confirm their connection, creating the start and end date based on the date the project was completed, and marking attendance and awarding hours of service as appropriate.

On the other hand, it's perfectly OK to leave the connections in pending status, if you don't want to track completion or delivery dates of the opportunity, and award hours of service.

What if I do want to confirm the volunteer and set a date for the project to start or finish?

You can communicate with the volunteer by email or phone and come to an agreement on the delivery date for the finished project. Then you can confirm the connection and set that delivery date as the 'start date and time' for the project, so the volunteer will see it in their volunteer overview as an upcoming opportunity. After the project has been completed, you can mark attendance and award service hours as appropriate.

In the example of our blanket knitting. We might estimate that it'll take 20 hours of work to complete the project. So if we communicate by mail with the volunteer, and agree that they will send us the blanket on March 30th. Then you can confirm the connection and set the start date and time to March 30, 6:00 pm,   and the end date and time to March 31, 2:00 pm.   Once the blanket is delivered, you can then mark the connection as 'attended' and credit the volunteer with 20 hours!

See this next article for ideas on how you can use the Advanced Registration System (ARS) to provide additional information, and have the volunteer agree upon a delivery date for the project, at the same time they express interest.

(Optional) Use Advanced Registration System (ARS) to further manage Virtual Opportunities

The Advanced Registration System (ARS) is an optional add on to HandsOn Connect that gives you the ability to add additional pages of information and forms to the process of signing up or expressing interest in a volunteer opportunity.

In the previous article, we discussed emailing a volunteer who had expressed interest in our virtual knitting project, sending them additional information, and perhaps agreeing on a date by which they expected to complete the project and mail or deliver it.

But what if we want to actually schedule a date for this virtual opportunity to be completed, and track hours for the work the volunteer did?

The ARS gives us the opportunity to give additional information, and allow the volunteer to tell us, while expressing interest, the date they plan to deliver the blanket to us. With this information, we can then confirm the connection by setting the start date of the connection to the delivery date they proposed.

Here's an example of how you can do this using the ARS. We want to find out from the volunteer the date they plan to complete and project.

Decide where you want to save the responses to the form

You can choose to simply download the responses to the form you'll be creating from the CMS via a CVS spreadsheet. You'll be able to download the spreadsheet directly from the CMS by going to AddOns / Export Form Data.

But you can also choose to synch this date to Salesforce so you can see this information directly in the connection that's created when the volunteer expresses interest. That's probably more useful in this scenario.

To do this: Add a new date field in the connection object, add it to your connection page layout, and then you'll be able to easily see the date that was submitted. Let's call our new connection field, "Virtual Completion Date"
[See this article for details on how to add a custom field to an object:]

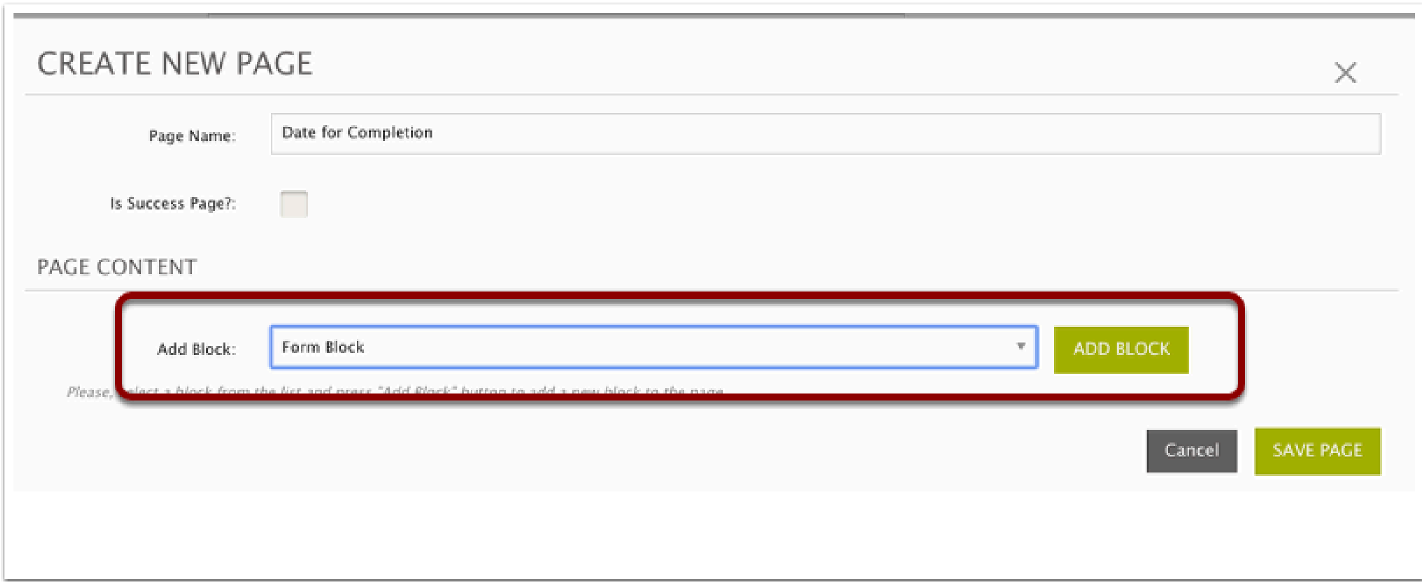
Create an Opportunity Signup Workflow

In the CMS, go to AddOns / Advanced Registration / Opportunity Signup / Add Workflow

Create a workflow. Let's name it "Virtual Blankets"

We're going to add one page to it, by clicking "Create New Page".

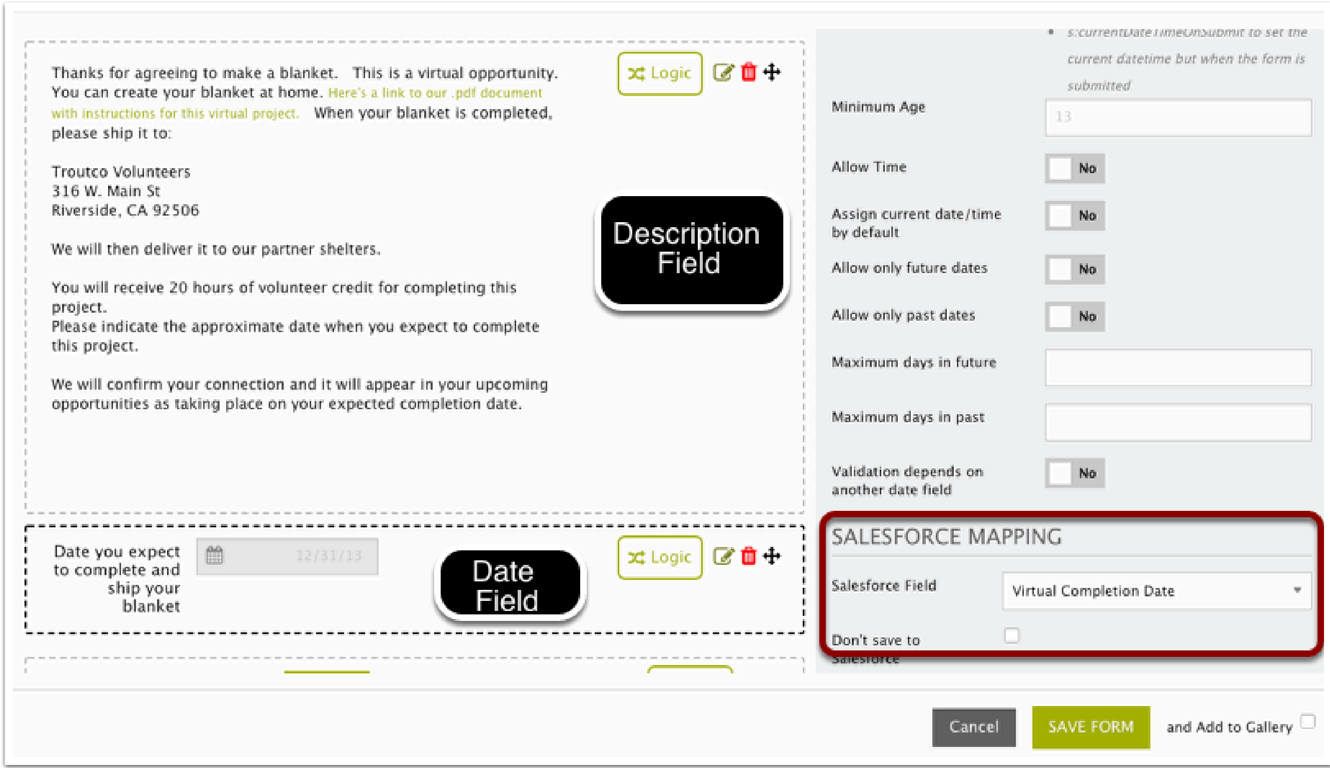
We'll call our new page "Date for Completion" and add a Form Block to it.



In the form, use a Description Field to give additional information about the project as needed.

Add a Date Field to the form and labele it "Date you expect to complete and ship your blanket". This will enable the volunteer to propose a date they plan to complete and deliver the project.

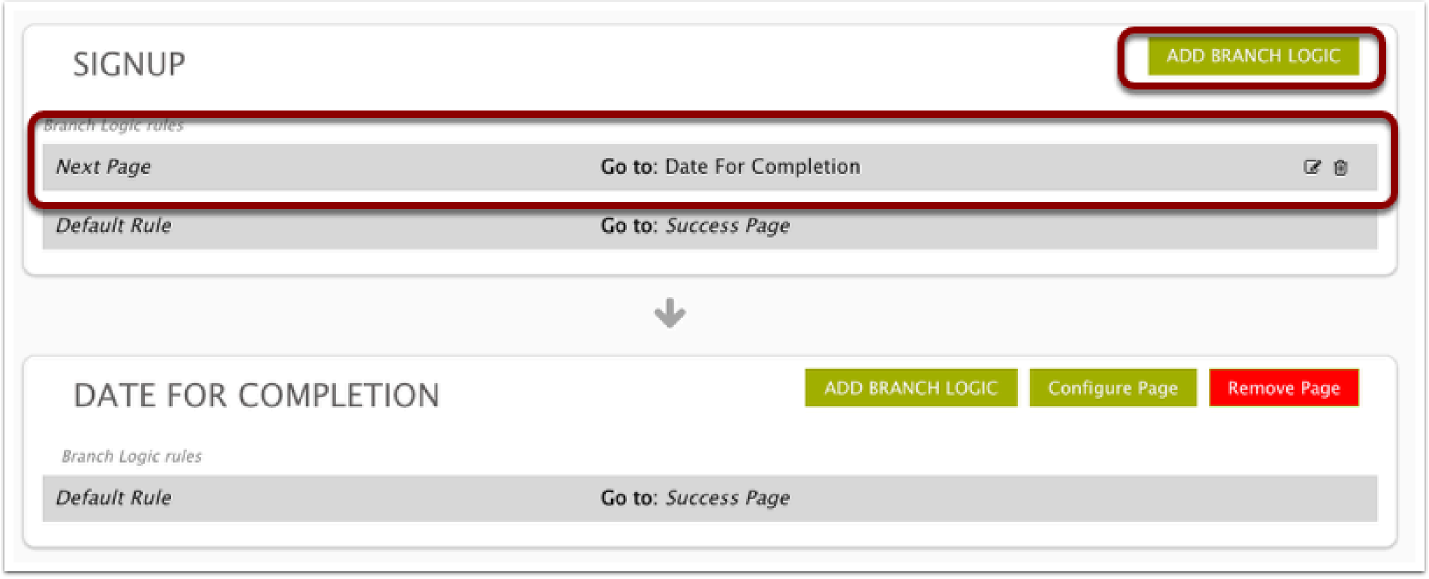
We'll map this field to the Salesforce field we created called "Virtual Completion Date"



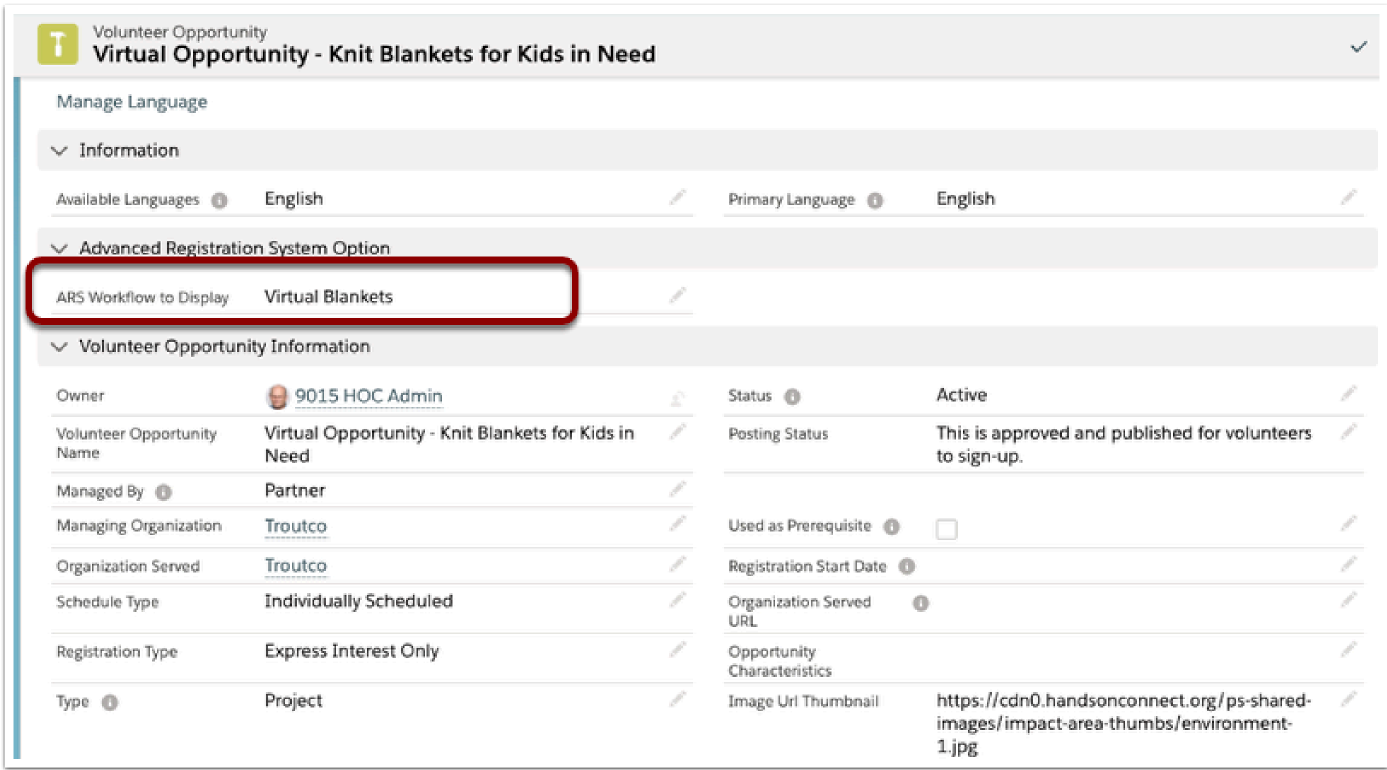
Note: After you create a new custom field in Salesforce, it may take up to an hour before that field is available for mapping in your form. So don't panic if the field isn't available for mapping in your form when you first create the form. You can save the form, and come back in a bit to map the field directly to SF if your field doesn't show up in the mapping options.

Add branch logic to go to the new page

After adding your new page, be sure to set the branch logic from the SIGNUP block, so that the next page is automatically "Date for Completion". Make sure each part of the workflow has branch logic set to take you to the next page in the workflow. This does not happen automatically!



After creating and saving your ARS Workflow, update your virtual opportunity in Salesforce and indicate it should use this ARS workflow

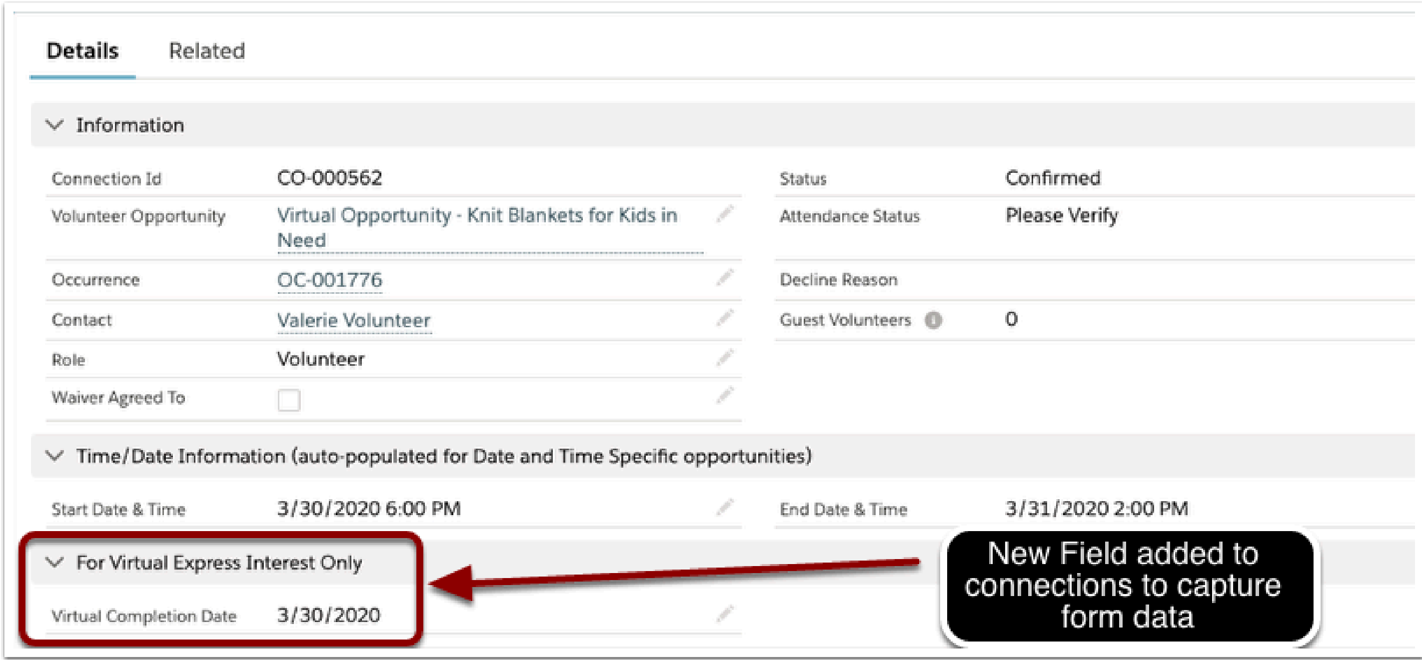


Now when volunteers express interest in the opportunity, they'll see the additional information and be able to indicate the date they expect to complete the blanket!   If synched to SF you'll be able to see that date in the Volunteer's Connection.

With that information, you can now set the start date and time and end date and time of the connection, and confirm the connection. The volunteer will then see the connection and the agreed upon 'due date' in their upcoming opportunities.

Sample connection page with additional field:

Here's Valerie Volunteer's connection created through the ARS. We can see her proposed "Virtual Completion Date" in her pending connection. So then you can confirm the connection and set the Start Date and Time and End Date and Time for the 20 hours duration that you estimate the project will take.



Once the blanket is delivered - You can mark the attendance status as 'attended and hours verified" and credit her for the 20 hours.   This way it'll be added to her civic transcript, and your reports will reflect the 20 hours of service for this Virtual Volunteer Opportunity.   (If the blanket is delivered early or late - just adjust the start date and end date as needed).

Other kinds of Virtual Opportunities

The articles in this chapter illustrate one type of virtual volunteer opportunity. Given that there are many different ways to participate virtually - you can adapt the information you provide in the opportunity description or ARS forms to meet the requirements and process for other types of virtual opportunities.

Here's some other ideas and resources for your virtual opportunities

Use online conferencing to facilitate virtual opportunities

Web conferencing is a great way to connect volunteers and facilitate on-line mentoring, virtual meetings and planning sessions, or to collaborate remotely.

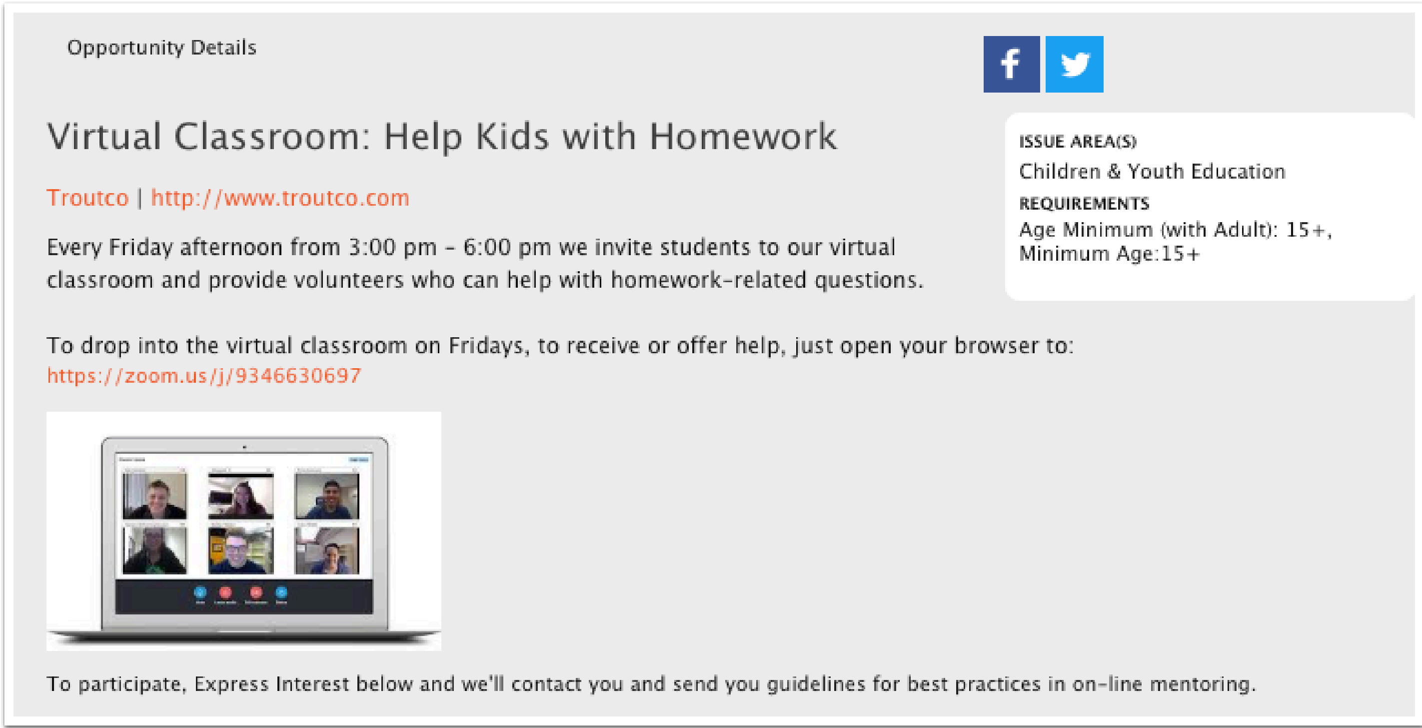
There are a number of web conferencing applications that are available. Some are free, some have nonprofit discounts. Here's links to a few resources:

Zoom.us - Free and paid plans.

GotoMeeting - here's a link to their free plan. They also have paid plans.

Webex - Free and paid plans.

You can include the URL and/or Phone Number for web conferences in either the Opportunity Description, or send a link in an email to volunteers you are engaging in web conferencing activities.



Need help in implementing virtual volunteerism?

If you need help thinking through the best way to create and manage your virtual opportunity ideas, pop into our virtual lab. We're available each day online to help you find the best solution to your virtual volunteering needs.

Click here to see the schedule, URL and phone numbers for our daily labs. Our labs themselves are a great example of a virtual opportunity - though we do not require you to sign up or express interest in advance.

See you in lab!

-Your HandsOn Connect Support Team