

Working with the Connections Grid

The connection grid lists all the connections associated with the volunteer opportunity record you're viewing.

Each Connection record tracks the contact (volunteer), who has signed up or expressed interest in the volunteer opportunity, and which occurrence (if date and time specific) they are connected to.

Connection Records are used to:

- 1) See who is confirmed to attend a given occurrence.
- 2) Confirm, decline or reschedule volunteers who have expressed interest.
- 3) Send emails to one or more connected volunteers

Finding Connections in the Grid

You can search for connections by entering a name, date, or any other keyword in the Search Bar at the top of the grid:

So for example, If I wanted to see all the connections for anyone named "Valerie" or all the connections starting or ending on "11/24/2017" - I could type this in the search bar.

Alternately - you can use any of the filters in the column heading - to filter the connections to find just the ones matching the filters you choose.

(You can use both a filter and a search term at the same time as a way to filter more granularly)

Use a combination of search and filters to find just the connections you wish to see.

You can also Sort the search/filter results by clicking on the column headers just above the filters.

The screenshot shows the 'Connections' interface. A search bar at the top left is labeled 'Find by keyword'. Below it are buttons for 'Email Volunteers', 'Mark Confirmed', and 'Mark Declined'. A table with columns: Actions, Contact, Start Time, End Time, Role, Status, Attendance, Hours Served, and Guest Volunteers. A red box highlights the search bar and the first row of the table. A callout 'Search by keyword' points to the search bar. Another callout 'Sort results using the column headers' points to the column headers. A third callout 'Filter from a picklist' points to the 'Art Trout' dropdown in the first row. The table shows three rows of data. At the bottom right, there are 'Previous', '1', and 'Next' buttons.

When no filters are selected - you'll see ALL the connections for this opportunity, displayed 10 to a page. You can use the page selector and next button to see the next set of 10 connections matching your filter (or no filter)

The screenshot shows a summary row with 'Confirmed' status, 'Attended (and Hours Verified)' with values '1' and '0'. Below this is a page selector with buttons for 'Previous', '1', '2', '3', '4', '5', and 'Next'. The '1' button is highlighted.

Taking Action on Connections

There are four actions you can take on the connections you've found:

- Email Volunteers
- Mark Confirmed
- Mark Declined

To take action on one or more connections, select the checkbox to indicate which connection you want to take action upon. (Selecting the checkbox at the top left of the grid will select ALL the connections that match your current search and filter (including those on subsequent pages that are not visible to you).

Connections

Find by keyword

Email Volunteers Mark Confirmed Mark Declined Add Connection Report Attendance

	Actions	Contact	Start Time	End Time	Role	Status	Attendance	Hours Served	Guest Volunteers
<input type="checkbox"/>	Edit	Art Trout						0	0
<input checked="" type="checkbox"/>	Edit	Virginia Volunteer	8/10/2017 8:00 PM	8/10/2017 9:00 PM	Volunteer	Confirmed	Attended (and Hours Verified)	1	0
<input type="checkbox"/>	Edit	Jhony J. Moncada			steer	Confirmed	Attended (and Hours Verified)	3	0
<input type="checkbox"/>	Edit	Vanessa Volunteer	6/29/2017 8:00 PM	6/29/2017 9:00 PM	Volunteer	Confirmed	Attended (and Hours Verified)	1	0

If checked - selects ALL connections matching search and filters

Or select individual Connections(s)

After selecting the connections you wish to take action on, select one of the three action buttons:

Connections

Find by keyword

Email Volunteers Mark Confirmed Mark Declined Add Connection Report Attendance

Email Volunteers: will open a window with a default message (complete with merge fields), which you can edit and customize as you wish. All selected volunteers will be sent the email.

Email Selected Contacts

The email below will be sent to the contacts you have selected (indicated in the TO: field). By default we've filled in a starter message for you with some merge fields from your data. You may add additional copy to the email, or modify this before sending.

To: Vir Volunteer, Jhony J. Moncada, Vanessa Volunteer.

Subject: [<Organization Name>] Additional information about your volunteer opportunity

Message:

Dear <Contact Name>,

Here's some additional information for you about the volunteer opportunity <Volunteer Opportunity Name> that you've signed up for on the <Organization Name> website, taking place on <Start Date Time> - <End Date Time>

Location:
<Street> <City> <State/Province>, <Zip/Postal Code>, <Country>
Google Map: <Google Map>

Cancel Send

! Note: Some team member contacts do not have email addresses. They will not be sent emails since their email address is unknown. (You may wish to email the team captain and remind him or her to contact their team members with whatever info you have sent).

Mark Confirmed or Mark Declined: Date and Time Specific volunteer opportunities with full sign up, automatically confirm a volunteer and notify them that they are confirmed. Opportunities in which a volunteer 'expresses interest' - have their connections created in Pending Status.

Depending on your needs - you can contact volunteers via email or phone, and then decide if you wish to confirm them. (To see the full contact info for a given volunteer - click on their name in the grid which will open their contact record for you!)

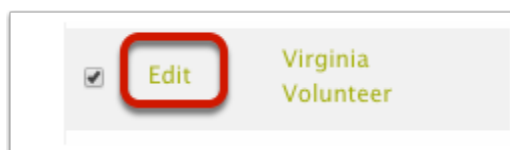
To confirm one or more connections, select them using the check box, and then click the "Mark Confirmed" button. The volunteer will automatically receive an email letting them know they are now confirmed to attend.

If you decide you do not want a volunteer to attend, you can select them and click "Mark Declined". If you do this, you will be asked to state a 'decline reason' and then the volunteer will receive an automated email indicating that you have declined them to participate in this opportunity. (The decline reason will not be included in the message).

Editing Connections

If you want to make a change to a connection, you have two options:

1) Click on the Edit action



In the edit screen you can update the following fields as needed:


Edit Connection

Volunteer Opportunity English as a Second Language Contact Name Virginia Volunteer	Occurrence 8/10/2017 8:00 PM - 8/10/2017 9:00 PM
Status * Confirmed	Attendance Status * Attended (and Hours Verified)
Hours Served 1	Guest Volunteers 0
Start Date & Time 8/10/2017 8:00 PM	End Date & Time 8/10/2017 9:00 PM

2) Some fields can be edited directly in the grid itself:

For example - if you want to reschedule the start and end time for an Individually Scheduled Opportunity,, before you confirm the connection, you can click on the start time and/or end time - and an 'edit' icon will appear. Click on this, and you can change the data in this cell.

You can also edit the data for Hours Served and/or Guest Volunteers.

<input type="checkbox"/>	Edit	Virginia Volunteer	8/10/2017 8:00 PM 	8/10/2017 9:00 PM
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After you edit one or more connections directly in the grid - you'll need to push the SAVE button to record your changes. You will be unable to confirm or decline connections until you've saved any updates you've made in the connection grid.

Individually Scheduled Opportunities - Express Interest Only

For Date and Time Specific Opportunities, and Individually Scheduled Opportunities with Schedule - the start date and time and end date and time of the connections will already be populated for you. So you can quickly confirm them.

For ISO's that are "Express Interest Only" (EIO) -- the connections are listed with no times. That's because you are just generating a list of volunteers who are interested -- and won't necessarily be scheduling them to attend anything.

Nonetheless -- if you DO wish to confirm and schedule a volunteer for an ISO - EIO , you can do so. However, you will need to edit the connection and set a start date and time and end date and time before you can confirm the volunteer - so they will know what day and time you've confirmed them to attend.

Connections

Find by keyword

Email Volunteers

Mark Confirmed

Mark Declined

Add Connections

Report Attendance

	Actions	Contact	Start Time ▼	End Time	Role	Status	Attendance	Hours Served	Guest Volunteers
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Pending Ap	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Edit	Elena vol1102			Volunteer	Pending Approval		0	0
<input type="checkbox"/>	Edit	Vanessa Volunteer			Volunteer	Pending Approval		0	0