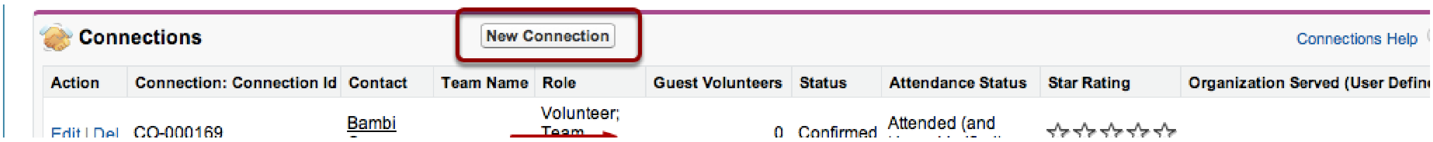
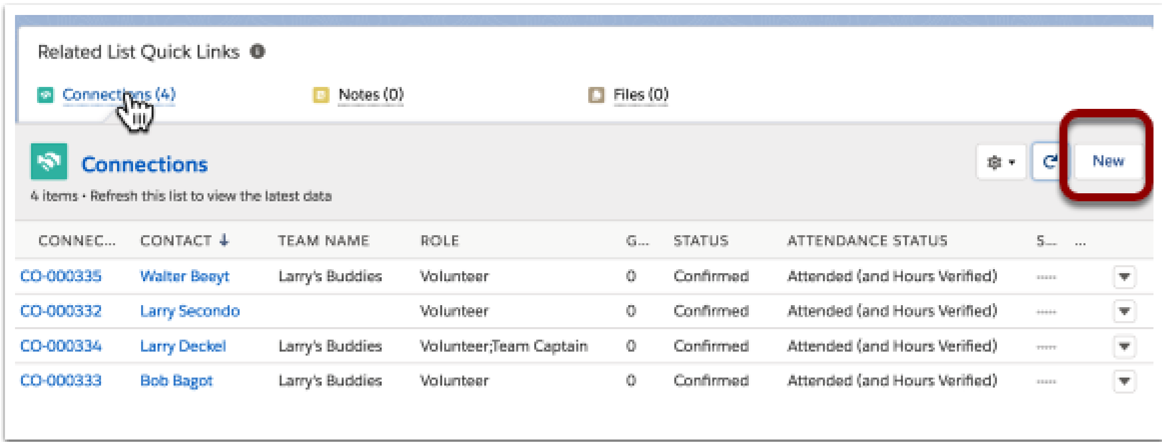
Administratively adding a connection to an occurrence

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.

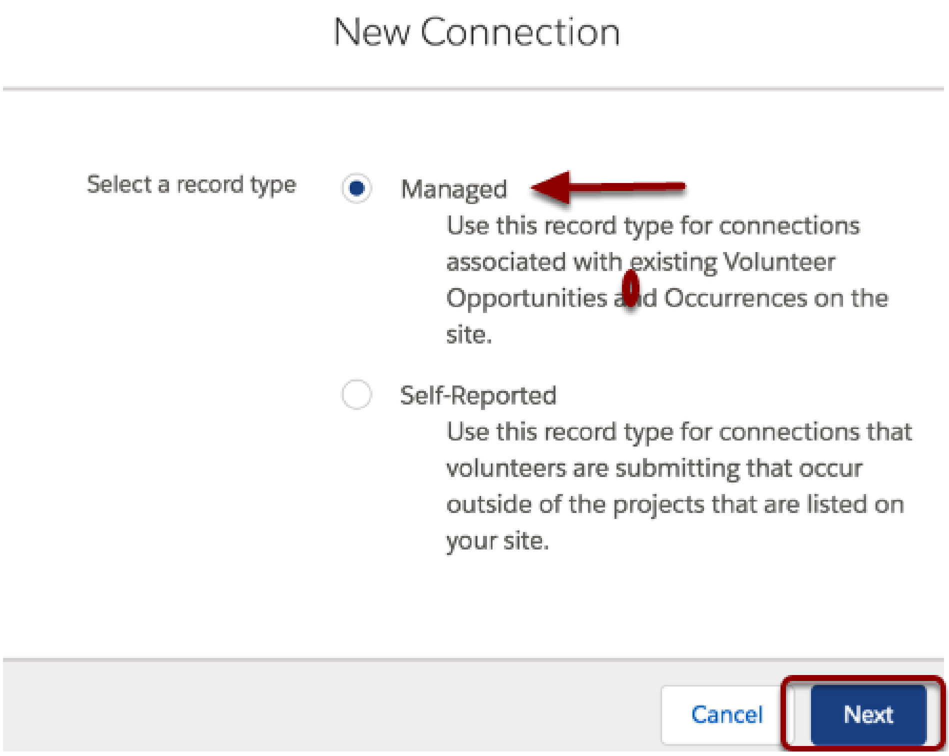
(Classic) Click on the NEW CONNECTION button in the connections related list of the occurrence record:



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

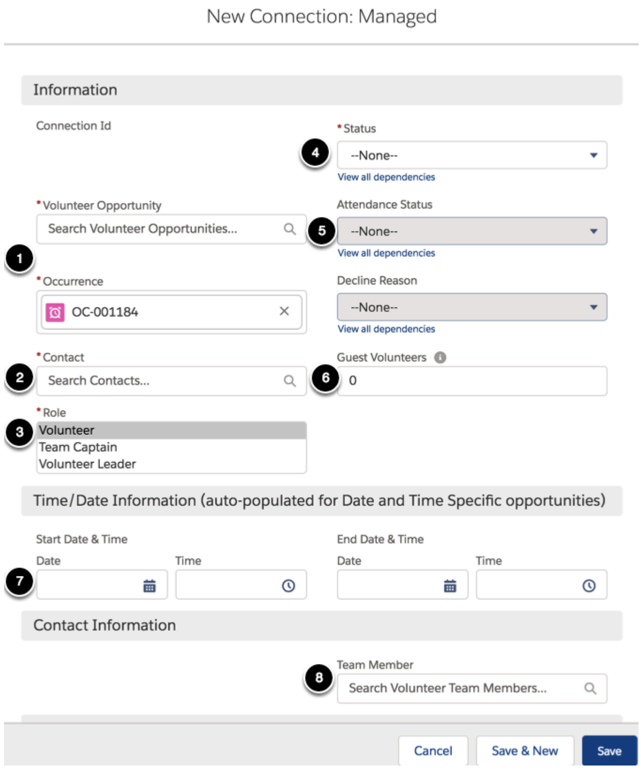


You'll be asked what type of connection to create. Choose "Managed" and click Next.



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.