

If you need people.

Have your people
call our people.



We rely on OneOC and the volunteers they connect us with to help get food to Orange County's hungry.
- Mark Lowry, CAPOC's O.C. Food Bank

Connecting nonprofits with volunteers is what we've done for over 50 years.

We connect young and old, diverse cultures and religions, and people of all economic levels to build a stronger, more vibrant Orange County. Every day, thousands of Orange County lives are touched by the way we unite the power of volunteers, philanthropic dollars and charitable causes.

Posting a Volunteer Project on www.OneOC.org

As a partner organization of OneOC, you have the ability to post a volunteer project on our website.

Using our technology, you can do the following:

- Create and publish volunteer opportunities
- Update basic information involving your organization
- Edit existing volunteer opportunities
- Monitor sign ups and review prospective volunteers
- Confirm volunteer participation for "express interest" opportunities
- Schedule volunteers for ongoing volunteer opportunities
- Communicate with volunteers via email

This guide introduces you to the basics of posting a volunteer project, supplementing the information you received from the training video.

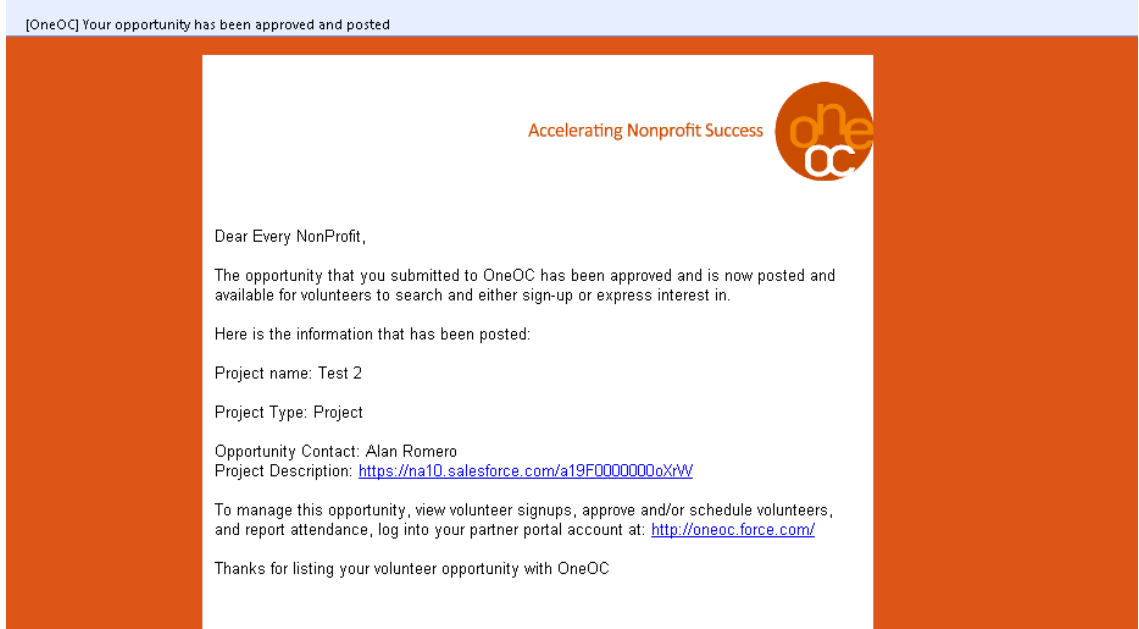
Let's get started!

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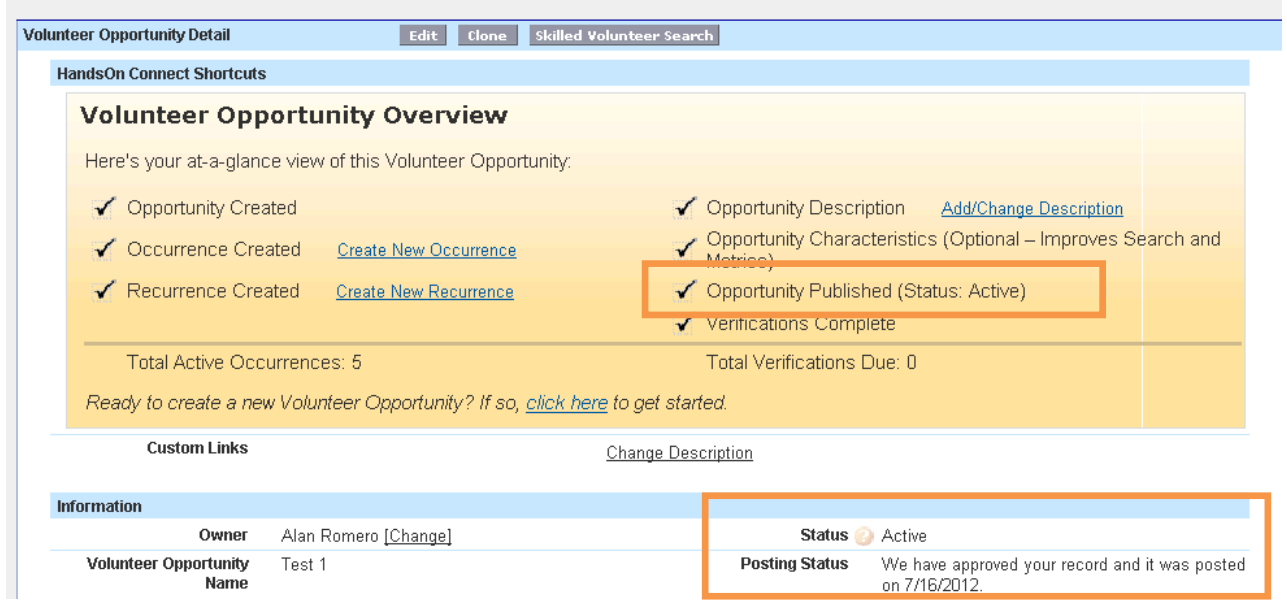
Part 2

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Posting Notification Email



Updated Volunteer Opportunity Record in your portal



Your volunteer opportunity is now published on OneOC's public website.

Creating an Occurrence (Partner Portal)

A single occurrence is created for you when you first create the volunteer opportunity using the Volunteer Opportunity Wizard.

If you wish to add additional occurrences to a date and time specific opportunity, you can do so by clicking on the New Occurrence Button in the occurrence related list.

A single volunteer opportunity can have as many individual occurrences (i.e. different dates and times it takes place) as you like. Each one will be treated as a separate sign-up. (We do not recommend creating separate occurrences for volunteer opportunities that take place each and every day. For those, creating a "to be scheduled" or ongoing opportunity might be an easier way to go!

NOTE: "To Be Scheduled" opportunities have only one occurrence. It is a special type of occurrence that keeps track of all connections for the duration of the ongoing opportunity.

Navigate to the Volunteer Opportunities Tab and choose an opportunity.

The screenshot shows the 'Volunteer Opportunities Home' page. At the top, there are navigation tabs: 'Volunteer Opportunities' (selected), 'Connections', 'Documents', 'Reports', and 'Switch to Volunteer Portal'. Below the tabs is a 'View:' dropdown menu set to 'All Volunteer Opportunities' and a 'Go!' button. A table titled 'Recent Volunteer Opportunities' is displayed, with a 'Create New Volunteer Opportunity' button to its right. The table has the following columns: Volunteer Opportunity Name, Default Location, Type, Registration Type, and Schedule. The table contains five rows of data:

Volunteer Opportunity Name	Default Location	Type	Registration Type	Schedule
Working with the Wizard	Troutco Warehouse	Project	Express Interest	Date & T
Read to Seniors	Kids Reading Room	Project	Sign Up	Date & T
Comicon Volunteers needed	Comicon	Project	Sign Up	Date & T
Numbers and Letters	Franklin Canyon Park	Activity	Express Interest	Date & T
Art's Wizarding World	Wizarding World of Wonder	Project	Express Interest	To Be Sc

Choose the Volunteer Opportunity to which you wish to add the occurrence, and click on the Volunteer Opportunity record hyperlink.

You can add a new occurrence in two ways:

1) Click on the link in the Volunteer Opportunity Overview:



Volunteer Opportunity Overview

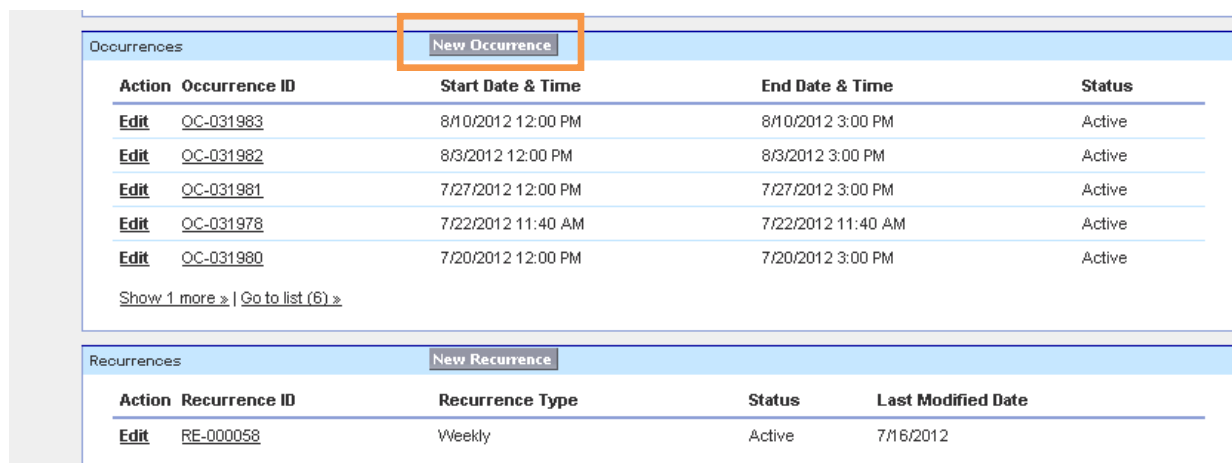
Here's your at-a-glance view of this Volunteer Opportunity:

- ✓ Opportunity Created
- ✓ Occurrence Created [Create New Occurrence](#)
- ✓ Recurrence Created [Create New Recurrence](#)
- ✓ Opportunity Description [Add/Change Description](#)
- ✓ Opportunity Characteristics (Optional – Improves Search and Metrics)
- ✓ Opportunity Published (Status: Active)
- ✓ Verifications Complete

Total Active Occurrences: 5 Total Verifications Due: 0

Ready to create a new Volunteer Opportunity? If so, [click here](#) to get started.

2) Scroll down to the Occurrences section of the page and click the “New Occurrence” button.



Occurrences [New Occurrence](#)

Action	Occurrence ID	Start Date & Time	End Date & Time	Status
Edit	OC-031983	8/10/2012 12:00 PM	8/10/2012 3:00 PM	Active
Edit	OC-031982	8/3/2012 12:00 PM	8/3/2012 3:00 PM	Active
Edit	OC-031981	7/27/2012 12:00 PM	7/27/2012 3:00 PM	Active
Edit	OC-031978	7/22/2012 11:40 AM	7/22/2012 11:40 AM	Active
Edit	OC-031980	7/20/2012 12:00 PM	7/20/2012 3:00 PM	Active

[Show 1 more »](#) | [Go to list \(6\) »](#)

Recurrences [New Recurrence](#)

Action	Recurrence ID	Recurrence Type	Status	Last Modified Date
Edit	RE-000058	Weekly	Active	7/16/2012

Volunteer Opportunity Name is auto populated for you (Or use Lookup if it's absent). Then add location:

1. Depending on which NEW button you use, the Volunteer Opportunity Name may already be filled out for you. If it is not, use the Lookup icon to search for the opportunity (click on the magnifying glass). It will be the top item on the 'recent' list.
2. Use the LookUp button to choose the location for this occurrence. (If the location has not already been created for this opportunity, you will need to create it first in order to look it up. If you have not created the location for this occurrence yet, you will need to do this before you go any further. You can open a new tab or window while signed on to create a new location.
3. Leave the Occurrence URL blank (it will be automatically filled out for you when you save the record).

Choose the status for this occurrence:

The screenshot shows the 'Occurrence Edit' form with a dropdown menu open for the 'Status' field. The dropdown menu lists the following options: Active (selected), Pending, Awaiting Approval, Admin, Inactive, and Canceled. The form fields include: Owner (Art Trout), Volunteer Opportunity (Read to Seniors), Location, Coordinator information (Opportunity Coordinator and Opportunity Coordinator Email), Posting Status, and Recurrence. Buttons for Save, Save & New, and Cancel are visible at the top.

Selecting “active” status will make this new occurrence available for sign-up on the public site IF the volunteer opportunity has already been approved.

- Pending means you have created the occurrence but don't want it to show up on the website yet. The host will not be notified until select “Active.”
- Awaiting Approval will appear after you saved the record, and before the host has approved it.
- Admin is for occurrences you never mean to have show up on the public site but just want to track administratively.
- Inactive means the opportunity has been archived or retired. The project is never meant to show up on the site again
- Canceled means the occurrence had been active, but has since been canceled.

Posting status, recurrence, volunteer leader required needed:

This close-up shows the 'Status' dropdown menu set to 'Active'. Below it are the 'Posting Status' and 'Recurrence' fields. The 'Posting Status' field is marked with a circled '1' and is currently blank. The 'Recurrence' field is marked with a circled '2' and is currently blank.

Leave Posting Status (1) blank: The Recurrence field (2) is a read only field that will be populated IF the occurrence was created as part of a recurrence.

Coordinator Information:

The screenshot shows the 'Coordinator Information' section of a Salesforce form. It includes fields for 'Opportunity Coordinator', 'Opportunity Coordinator Email', 'Registration Start Date' (with a calendar icon and a date of 7/13/2011), and 'Registration cutoff (hours)'. Below this is the 'Time/Date Information' section with 'Start Date & Time' (7/13/2011 7:4) and 'Days & Times Needed' (a list of available times: Sunday Morning, Sunday Afternoon, Sunday Evening). An orange arrow points to the magnifying glass icon next to the 'Opportunity Coordinator' field. To the right, a 'Lookup' window is open, showing a search for 'Lenny Leader' with 'Go!' and 'New' buttons. Below the search bar is a '< Clear Search Results' link, also indicated by an orange arrow. The search results table shows one entry: 'Lenny Leader' with 'Individual' as the organization name.

Use the lookup field to look up the name of the Opportunity Coordinator. **This must be you or someone on your staff who was granted portal access.**

Leave Opportunity Coordinator Email blank. It will be looked up and filled out when you save the record.

Fill out Registration Information:

The screenshot shows the 'Registration Information' section of the form. It includes fields for 'Registration Start Date' (7/21/2011 [7/13/2011]), 'Registration cutoff (hours)' (2), 'Minimum Attendance' (1), and 'Maximum Attendance' (10). Three numbered callouts (1, 2, and 3) are placed over the date, cutoff, and attendance fields respectively.

This section is optional:

1. If you don't want people to sign up until a certain date, then use the Registration Start Date field to designate that date. Make sure it conforms to the correct format. A good trick is to use the suggested date, and then edit it in that format.
2. Registration Cutoff (hours): This is the number of hours before the start time when you can no longer sign up. If registration closes a day before the occurrence, you would enter 24.
3. If there is a Minimum or Maximum attendance, input that information here. If you leave this blank, it will use the default settings that you established when you first created the volunteer opportunity. (FYI: An Express Interest has a default of 1 Min and 500 Max).

Edit Start and End Times

The screenshot shows a web form titled "Time/Date Information". It has two main sections: "Start Date & Time" and "End Date & Time". The "Start Date & Time" field contains "9/14/2011 1:00 PM" and the "End Date & Time" field contains "9/14/2011 3:00 PM". Below these fields is a "Days & Times Needed" section with a calendar pop-up for September 2011. The calendar shows the 14th of September is selected. There are also "Update all the existing connections?" dropdown menus set to "--None--".

Formatting is important here. It needs to be in mm/dd/yyyy hh:mm PM format. Placing the cursor in the field will prompt a calendar to pop up. This is the easiest way to start. Select the date of the occurrence. Rather awkwardly, when you pick the date, the system automatically selects the current time by default. Manually edit the actual start time for the volunteer opportunity (e.g. 9/14/2011 1:00 PM).

Then **copy** it and paste it into the end date & time field, and just edit the end time.

Days and Times automatically populate for Date and Time Specific Opportunities when you save the record. Just leave this blank.

The screenshot shows a web form with two sections: "Registration Information" and "Time/Date Information". The "Registration Information" section has fields for "Registration Start Date" (7/16/2012), "Registration cutoff (hours)", "Minimum Attendance", and "Maximum Attendance". The "Time/Date Information" section has fields for "Start Date & Time" (7/16/2012 3:44 PM), "End Date & Time" (7/16/2012 3:44 PM), and "Update all the existing connections?" (set to "--None--"). The "Days & Times Needed" section is highlighted with an orange circle and shows a list of options: "Available", "Sunday Morning", and "Sunday Afternoon". There are also "Chosen" and "Available" labels with arrows.

Leave this blank for Date and Time Specific Opportunities. The days and times will be automatically calculated for you when you save the record.

In summary, **there are only 5 fields you MUST fill out when creating the occurrence:**

The screenshot shows the 'Occurrence Edit' form with the following fields and callouts:

- Information:** Owner (Art Trout), Volunteer Opportunity (Read to Seniors - callout 1), Location (Troutco Building - callout 2), Status (Active - callout 3), Posting Status, Recurrence.
- Coordinator Information:** Opportunity Coordinator, Opportunity Coordinator Email.
- Registration Information:** Registration Start Date (8/26/2011), Registration cutoff (hours), Minimum Attendance, Maximum Attendance.
- Time/Date Information:** Start Date & Time (9/14/2011 1:00 PM - callout 4), Days & Times Needed (Available: Sunday Morning, Sunday Afternoon, Sunday Evening; Chosen), End Date & Time (9/14/2011 3:00 PM - callout 5), Update all the existing connections? (--None--).

Save this new occurrence:

This close-up shows the 'Time/Date Information' section with the following details:

- Start Date & Time: [7/16/2012 3:44 PM]
- End Date & Time: [7/16/2012 3:44 PM]
- Days & Times Needed: Available (Sunday Morning, Sunday Afternoon), Chosen.
- Update all the existing connections?: --None--

Below this is the 'Volunteer Hours Summary' section with fields for Guest Volunteer Hours Served and Volunteer Hours Served. At the bottom, the 'Save' button is highlighted with an orange box, along with 'Save & New' and 'Cancel' buttons.

If the status is active, saving the record will publish the occurrence. Please note that for the occurrence to be published, both the Occurrence and the Volunteer Opportunity must be Active.

The occurrence record is created, and defaults are filled in.

Occurrence Detail [Edit](#) [Clone](#) [Print Check-In Sheet](#)

HandsOn Connect Shortcuts

Occurrence Overview
Here's your at-a-glance view of this Occurrence.

- ✓ Occurrence Published (Status: Active)
- Verifications Complete
- Total Verifications Due: 0

Ready to create a new Occurrence? If so, [click here](#) to get started.

Information

Owner	Art Trout [Change]	Status	Active
Occurrence ID	OC-025252	Posting Status	We have approved your record and it was posted on 8/26/2011.
Volunteer Opportunity	Read to Seniors	Recurrence	
Location	Troutco Building		

Coordinator Information

Opportunity Coordinator	Art Trout	Opportunity Coordinator Email	troutco+training_partner@gmail.com
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Registration Information

Registration Start Date		Minimum Attendance	1
Registration cutoff (hours)		Maximum Attendance	15

Time/Date Information

Start Date & Time	9/14/2011 1:00 PM	End Date & Time	9/14/2011 3:00 PM
Days & Times Needed	Wednesday Afternoon	Update all the existing connections?	<input type="checkbox"/>

Creating a Recurrence (Partner Portal)

A recurrence is a regular pattern of occurrences.

It is a useful way to create a number of 'duplicate' occurrences that repeat on select days (i.e. An opportunity that has occurrences on the 1st and 3rd Monday of every month).

Recurrences happen at the same location at the same time of day, just on different days. You CAN edit the individual occurrences, 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:

Site Managed by:

Volunteer Opportunity
Test 1 [Printable View](#)

[Back to List: Volunteer Opportunities](#)

Volunteer Opportunity Detail [Edit](#) [Clone](#) [Skilled Volunteer Search](#)

HandsOn Connect Shortcuts

Volunteer Opportunity Overview
Here's your at-a-glance view of this Volunteer Opportunity:

- ✓ Opportunity Created
- ✓ Occurrence Created [Create New Occurrence](#)
- ✓ Recurrence Create [Create New Recurrence](#)
- ✓ Opportunity Description [Add/Change Description](#)
- ✓ Opportunity Characteristics (Optional – Improves Search and Metrics)
- Opportunity Published (Status: Pending) [Submit for Approval](#)
- ✓ Verifications Complete

Total Active Occurrences: 5 Total Verifications Due: 0

Custom Links [Change Description](#)

You can use the Create New Occurrence link in the Volunteer Opportunity Overview. Or, you can use the topic quick link to scroll down to the Recurrence Section and then click New Occurrence:

[Edit](#) [Clone](#) [Skilled Volunteer Search](#)

Occurrences		New Occurrence		
Action	Occurrence ID	Start Date & Time	End Date & Time	Status
Edit	OC-031983	8/10/2012 12:00 PM	8/10/2012 3:00 PM	Active
Edit	OC-031982	8/3/2012 12:00 PM	8/3/2012 3:00 PM	Active
Edit	OC-031981	7/27/2012 12:00 PM	7/27/2012 3:00 PM	Active
Edit	OC-031978	7/22/2012 11:40 AM	7/22/2012 11:40 AM	Active
Edit	OC-031980	7/20/2012 12:00 PM	7/20/2012 3:00 PM	Active
Show 1 more » Go to list (6) »				

Recurrences		New Recurrence		
Action	Recurrence ID	Recurrence Type	Status	Last Modified Date
Edit	RE-000056	Weekly	Active	7/11/2012

Both options take you to the New Recurrence screen. Set the status and the volunteer opportunity:

Recurrence Overview

Here's your at-a-glance view of this Recurrence.

Recurrence Published (Status: Active)

Recurrence Information

Volunteer Opportunity:

Status: Active

Coordinator Information

Opportunity Coordinator:

Opportunity Coordinator Email: Active

Time/Date Information

Start Date: End Date:

Start Time: 12:00 PM End Time: 03:00 PM

Update all Existing Connections?: --None--

Use the lookup icon to search for the Volunteer Opportunity this recurrence is connected to. Set the status for the occurrence to active if you wish all the resulting occurrences to be active.

Set the start and end times:

Search All ▼

Go!

Advanced Search...

Create New... ▼

Recent Items

- [Test 1](#)
- [RE-000058](#)
- [Test 2](#)
- [RE-000060](#)
- [OC-031938](#)
- [OC-032002](#)

Time/Date Information

Start Date: End Date:

Start Time: --None-- End Time: --None--

Recurrence Type

Recurrence Type: 12:00 AM

Sign-up Information

Registration Start Date: Minimum Attendance:

Registration cutoff (hours): Maximum Attendance:

Location Information

Street: Suite 100

City:

State/Province:

Zip/Postal Code:

Note: The end date cannot be later than the end date you set up for the Volunteer Opportunity. An error message will appear if you attempt this. Clicking on the Start Date field will pop open a calendar.

Set up the Type of Recurrence:

Time/Date Information	
Start Date	12/22/2010 [12/20/2010]
Start Time	07:00 AM ▾
Recurrence Type	--None-- ▾
<div style="border: 1px solid black; padding: 2px;"> --None-- Daily Weekly Monthly </div>	
Sign-up Information	
Registration Start Date	[12/20/2010]
Registration DeadLine	

How often does this event recur? Remember, when you build each instance of the recurrence, you have to set it so that the event occurs 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 individual occurrences. When you do that, however, the recurrence is broken and you cannot edit them as a group anymore.

You can create monthly recurrences, weekly ones, or even daily ones. If the occurrences are going to take place daily over an extended period of time, you might want to create this volunteer opportunity as a "to be scheduled" opportunity.

Choose the Recurrence Type:

Time/Date Information	
Start Date	12/22/2010 [12/20/2010]
Start Time	07:00 AM ▾
Recurrence Type	Monthly ▾
Monthly Recurrence Type	First ▾
Day of Month	Tuesday ▾
<div style="border: 1px solid black; padding: 2px;"> Tuesday Sunday Monday Tuesday Wednesday Thursday Friday Saturday </div>	
Sign-up Information	
Registration Start Date	[12/20/2010]
Registration DeadLine	
Location Information	

Once you choose the Recurrence Type, a new option will appear.

Set up your Sign-Up Information:

Sign-up Information	
Registration Start Date 	<input type="text" value="8/26/2011"/> Minimum Attendance <input type="text"/>
Registration cutoff (hours) <input type="text"/>	Maximum Attendance <input type="text"/>

Note: If you leave these fields blank, they populate with the default information you originally entered.

- Registration Start Date: When would you like people to begin signing up for this recurrence?
- Registration cutoff (hours): How many hours before the start of this occurrence is registration turned off? Just put the number in this field.

You can choose to input a Description:

Description Information	
Description	<input type="text" value="This is the weekly 2 PM occurrence of this opportunity."/>
System Information	

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

Click Save:

Description Information	
Description	<input type="text" value="This is the weekly 2 PM occurrence of this opportunity."/>
System Information	
Created By	<input type="text" value="L"/>
<input type="button" value="Save"/> <input type="button" value="Delete"/> <input type="button" value="Clone"/> <input type="button" value="Cancel"/>	

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 times.

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

Occurrence Record Saved View (Partner Portal)

Each Volunteer Opportunity may have several occurrences. A volunteer opportunity must have at least ONE occurrence before it can be published on the public site. Date and Time Specific Volunteer Opportunities have a separate occurrence for each unique day and time that volunteers sign up.

To Be Scheduled (Ongoing) opportunities, have only one occurrence. This occurrence serves as a “time-sheet.” 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.

The screenshot displays the 'Occurrence Record Saved View' for an occurrence with ID OC-023651. The page is titled 'Occurrence OC-023651' and includes a 'Printable View' link. Below the title, there are navigation options: 'Back to Volunteer Opportunity: Help Kids to Read', 'Edit', 'Clone', and 'Print Check-In Sheet'. The main content area is divided into several sections:

- HandsOn Connect Shortcuts:** Contains an 'Occurrence Overview' section with a yellow background. It states: 'Here's your at-a-glance view of this Occurrence.' and lists:
 - ✓ Occurrence Published (Status: Active)
 - Verifications Complete
 - Total Verifications Due: 1
 A note at the bottom says: 'Ready to create a new Occurrence? If so, [click here](#) to get started.'
- Information:** A table-like section with fields:
 - Owner: Art Ordoqui [Change]
 - Occurrence ID: OC-023651
 - Volunteer Opportunity: [Help Kids to Read](#)
 - Location: [Troutco Building](#)
 - Status: Active
 - Posting Status: We have approved your record and it was posted on 2/10/2011.
 - Recurrence
- Coordinator Information:** Fields for Opportunity Coordinator and Opportunity Coordinator Email.
- Registration Information:** Fields for Registration Start Date, Registration cutoff (hours) (3), Minimum Attendance (1), and Maximum Attendance (15).
- Time/Date Information:** Fields for Start Date & Time (2/10/2011 11:00 AM), Days & Times Needed (Thursday Afternoon), End Date & Time (2/10/2011 1:00 PM), and an 'Update all the existing connections?' button.
- Volunteer Summary:** A table showing connection statistics.

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 will get your most useful data if your occurrences are always completely verified.

The Summary Sections are automatically calculated for you and give you “at-a-glance” statistics for this one occurrence.

Volunteer Summary			
Total Connections	1	Volunteers Attended	0
Total Pending	0	Guest Volunteers Attended	0
Total Confirmed	1	Total Attended	0
Total Declined	0	Total Not Attended	0
Volunteers Still Needed	14	Total Unreported	1

Connections

Pending/Declined Connections

The Connections Grid

▼ Connections

Pending/Declined Connections

New Connection							Mark Confirmed	Mark Declined ▼	Mark Pending Approval	Email Members
ID	Contact	Team	Anon	Status	Decline Reason					

Confirmed Connections

Mass Action ▼										Email Members
ID	Attendance	Contact	Team	Anon	Start	End	Hours	Anon Hours	Feedback	
CO-076382	Please Verify	Natasha Georgescu		0	6/28/2011 8:00 PM	6/28/2011 9:00 PM	0.00	0.00	☆☆☆☆☆	
CO-072841	Please Verify	Thou Nouwen		0	6/28/2011 8:00 PM	6/28/2011 9:00 PM	0.00	0.00	☆☆☆☆☆	
CO-078403	Please Verify	Jennifer Eidahl	Eidahls	0	6/28/2011 8:00 PM	6/28/2011 9:00 PM	0.00	0.00	☆☆☆☆☆	
CO-079407	Please Verify	Michelle Pavelic		0	6/28/2011 8:00 PM	6/28/2011 9:00 PM	0.00	0.00	☆☆☆☆☆	
CO-081584	Please Verify	Heather Greiff(VL)		0	6/28/2011 8:00 PM	6/28/2011 9:00 PM	0.00	0.00	☆☆☆☆☆	
CO-084751	Please Verify	Valerie Volunteer		0	6/28/2011 8:00 PM	6/28/2011 9:00 PM	0.00	0.00	☆☆☆☆☆	

The Connections Grid is where you manage all the connections (sign-ups or express interests) associated with the occurrence. See managing connections for more information.

Connection Grid Overview

The most powerful component in the Occurrence Record is the Connections Grid. It is divided into two halves: Pending/Declined Connections, and Confirmed Connections. The Connections Grid:

▼ Connections

Pending/Declined Connections ①

New Connection							Mark Confirmed	Mark Declined ▼	Mark Pending Approval	Email Members
ID	Contact	Team	Anon	Status	Decline Reason					

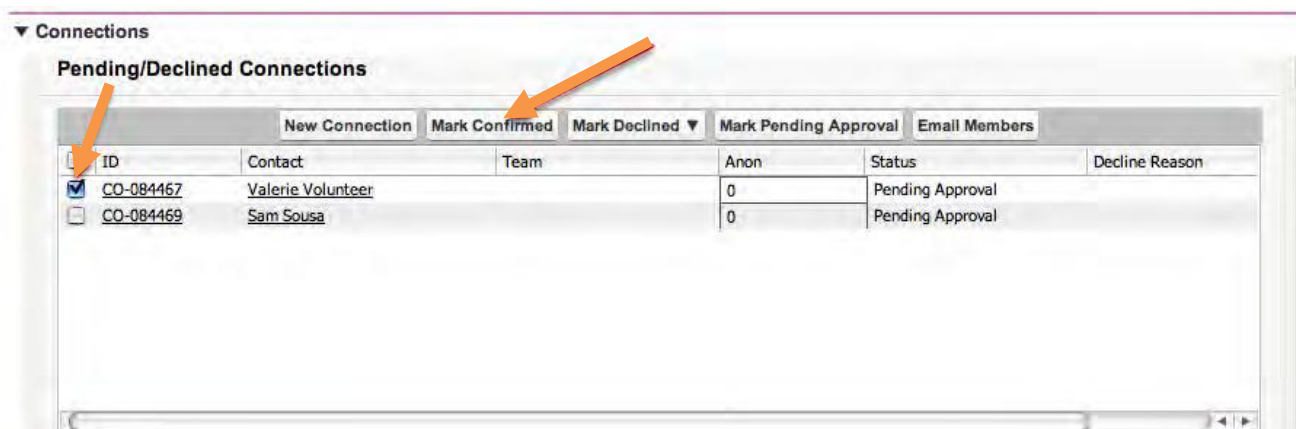
Confirmed Connections ②

Mass Action ▼										Email Members
ID	Attendance	Contact	Team	Anon	Start	End	Hours	Anon Hours	Feedback	
CO-000034	Please Verify	Art Trout		0	7/16/2010 7:00 PM	7/16/2010 8:30 PM	0.00	0.00	☆☆☆☆☆	
CO-000001	Please Verify	Lenny Leader(VL)		2	7/16/2010 7:00 PM	7/16/2010 8:30 PM	0.00	0.00	☆☆☆☆☆	
CO-000019	Please Verify	Valerie Volunteer		3	7/16/2010 7:00 PM	7/16/2010 8:30 PM	0.00	0.00	☆☆☆☆☆	

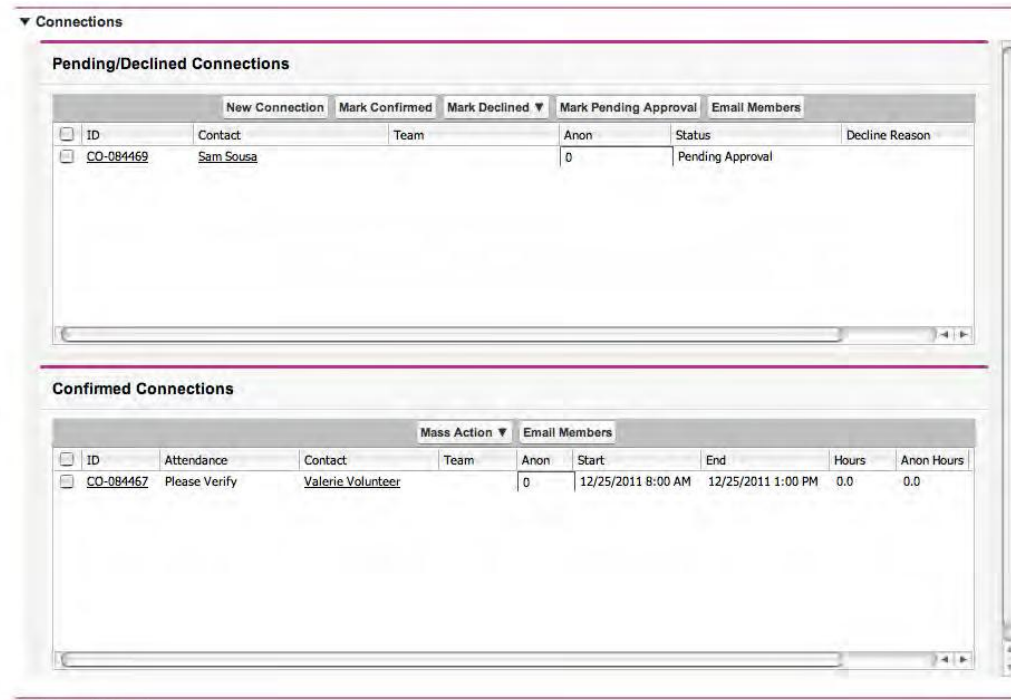
1. The Pending/Declined Connections half of the grid is where connections will appear in three scenarios:
 - a. The Opportunity is an 'express interest' opportunity, and the connections are awaiting approval and listed as pending.
 - b. A connected has been declined (not approved) to participate in the occurrence
 - c. A volunteer has 'removed themselves' (cancelled) from the opportunity. (They were still connected, but are not longer confirmed as attending)
2. The Confirmation Connections half of the grid shows all the volunteers who should be attending the occurrence. This half of the grid is also used to verify attendance and service hours AFTER the occurrence has taken place.

Managing Connections

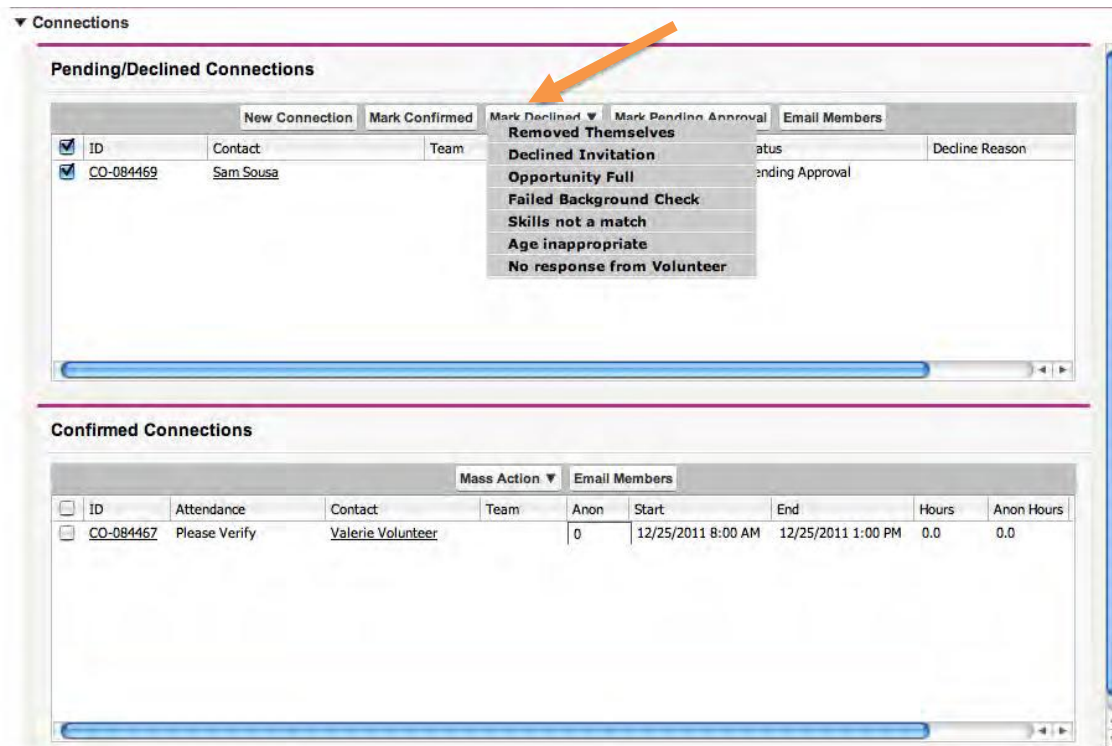
1. To **confirm** a volunteer's participation in the occurrence put a check box next to the name of the volunteer you wish to confirm, and then click the "Mark Confirmed" button



- a. Doing this will move them from the Pending/Declined connections section, to the Confirmed Connections section of the grid (See visual on following page)
- b. We've now confirmed our example of Valerie as a volunteer. Her status is "Please verify" and will remain that way until you mark attendance after the opportunity has taken place.

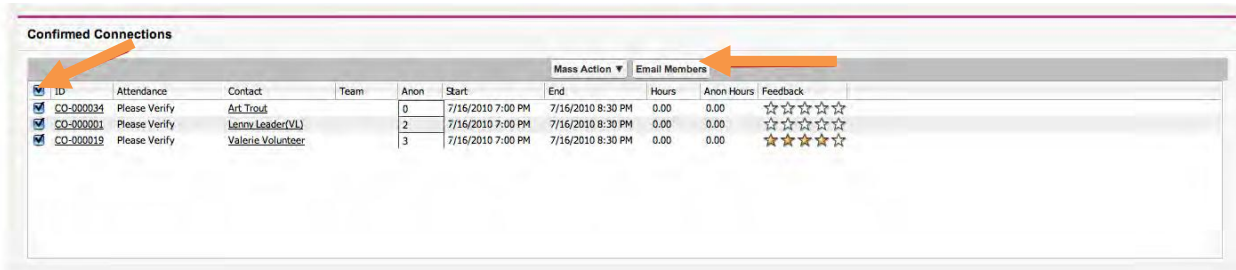


2. To **decline** a volunteer's participation, check the box next to his name and click the Mark Declined button.
 - a. Clicking the "Mark Declined" button gives you a list of options, so you can note why the volunteer was declined.
 - b. The declined status of a volunteer will appear in the "Decline Reason" column for easy reference.



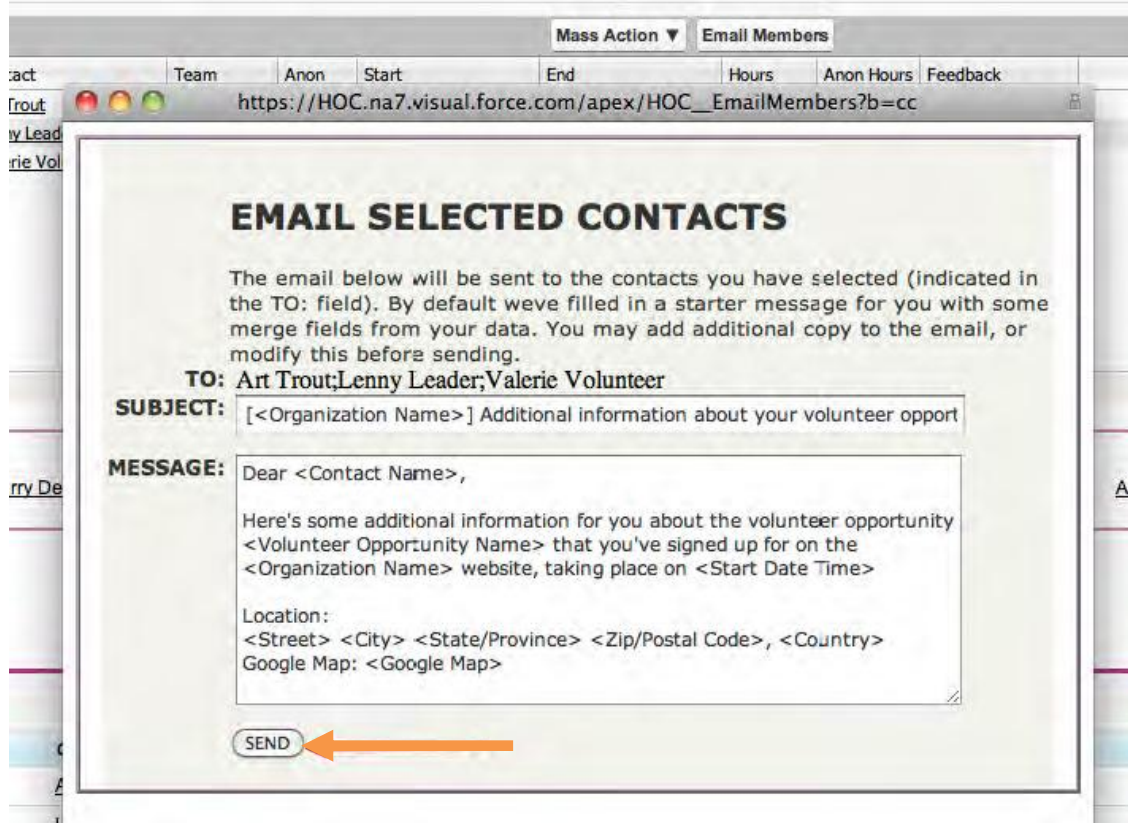
Using the Connection Grid to send emails to Volunteers

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



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 focus on. Then, click on the “Email Members” button.

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



The email contains a number of merge fields to personalize the email with details. You can edit the message as you wish, adding additional content and deleting default information. Click SEND to send the email to each volunteer.

