

Quick Start Guide for Events



Volunteer Scheduler Pro

Effective Scheduling Software

Skills and tasks

Subdivisions are used to distinguish between different positions within the same job by task or skill, such as designating what area to serve in during setup. You can specify different volunteers to be qualified to serve in each subdivision you create. Each volunteer can be designated for more than one subdivision when appropriate.

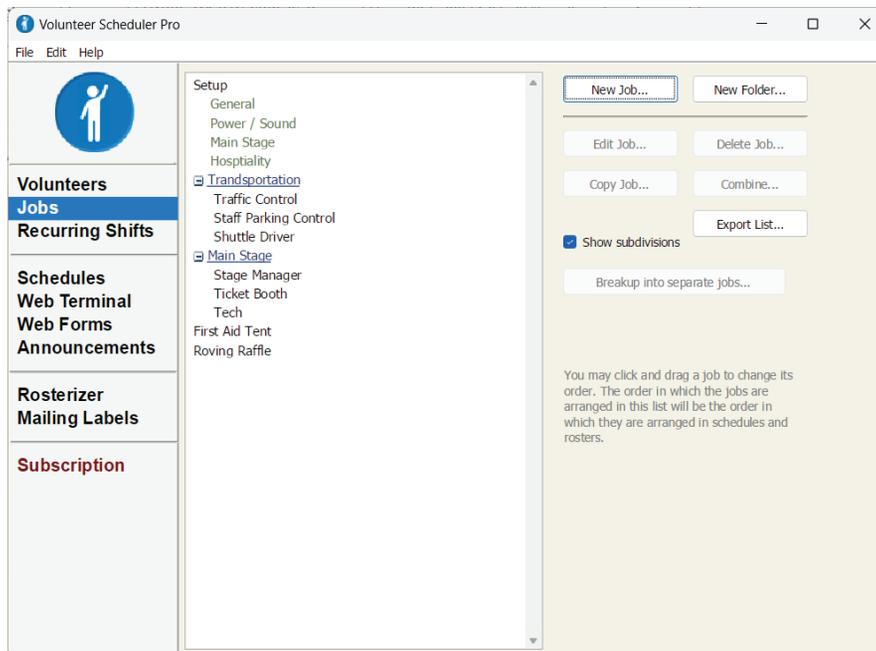
Folders (available with the Standard edition) can be used to group jobs together by location, type of job, even area of oversight, or any other way that makes sense to your event. Doing so makes it easier to group and communicate with volunteers qualified in those jobs.

1

Enter your jobs

Job refers to any task performed by your volunteers at a shift. For each shift, you can specify how many volunteers should be scheduled in each job.

1. Click on the Jobs pane.
2. Click the “+” button and select “New job.”
3. Name your job.



2

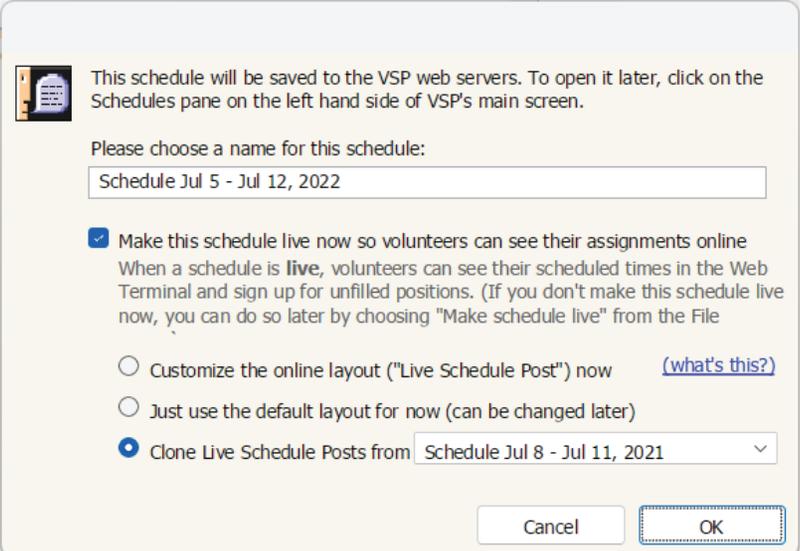
Creating a schedule

After you have entered all your jobs, create a schedule. Note that all the shifts and jobs that will occur within this time period will be included on this “master schedule.”

1. Click on the Schedules pane.
2. Enter the start and end dates for a schedule, and then click the “Create...” button.
3. Click on a day in the calendar on which one of your shifts takes place, and then click the “New Shift...” button at the top of the window.
4. In the dialog that appears, set the start and end time for the shift.
5. If the shift repeats on other days of the week, or monthly or yearly, use the controls under the “Repeats” heading to set up the appropriate repeating pattern.
6. Specify how many volunteers from each job are required for this shift.
7. Click “OK.”
8. Repeat this process for all your other shifts.

When you have finished creating all your shifts:

1. Choose “Save” from the File menu at the top of the schedule window.
2. A dialog will open asking you to enter a name for the schedule. Be sure the box is checked to “Make this schedule live now” and select the option to “Just use the default layout for now.”
3. Click “OK.”



This schedule will be saved to the VSP web servers. To open it later, click on the Schedules pane on the left hand side of VSP's main screen.

Please choose a name for this schedule:

Make this schedule live now so volunteers can see their assignments online
When a schedule is **live**, volunteers can see their scheduled times in the Web Terminal and sign up for unfilled positions. (If you don't make this schedule live now, you can do so later by choosing "Make schedule live" from the File

Customize the online layout ("Live Schedule Post") now [\(what's this?\)](#)

Just use the default layout for now (can be changed later)

Clone Live Schedule Posts from

Cancel OK

3

Setup online enrollment

Now that your schedule is set up, it is time to configure how volunteers sign up, or enroll, for your event. As people enroll, they're added to your database.

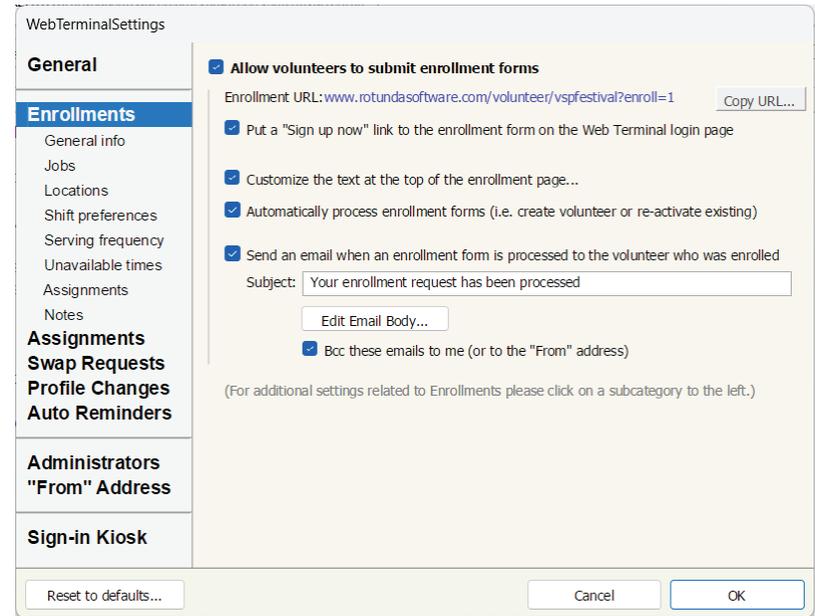
[Watch this video](#) for a walkthrough of the full enrollment form setup process.

To see the enrollment form:

1. Open the Web Terminal pane.
2. Click the "Web Terminal Settings" button, then select Enrollments on the left.
3. The Enrollment URL at the top is the direct link to your form.

By default, enrollment forms are processed automatically, and the following will occur:

- The volunteer will be added as an active volunteer to the Volunteers pane.
- The volunteer is placed in the shifts they selected when filling out the enrollment form. You can verify this on the schedule.
- The volunteer will receive an email confirming their enrollment form was processed and information on how to log in to the Web Terminal to sign up for additional shifts, update their profile, and more.



Customizing VSP for your organization

Custom fields, available in the Standard edition, can be used to collect and track volunteer information that is not reflected in the predetermined fields within VSP. Examples of common custom fields include t-shirt size, birthday, certifications, and more. Custom fields can be added to the enrollment form and the My Profile form so that volunteers can update these fields themselves online.

[Click here](#) for a video on how to set up custom fields.

1. Go to the Volunteers pane and click “New Volunteer...”
2. In the new window, click the “Edit Custom Fields...” button.
3. Click the “Create New Field” button.
4. You have different options for custom fields: text, number, date, checkbox, and list of options. Once you create the field it will appear in the main part of the screen.
5. Click OK once you have added all the custom fields you wish to track.

Customizing the enrollment form

1. Click on the Web Terminal pane on the left-hand side of VSP’s main screen.
2. At the top of the pane, click the “Web Terminal Settings” button and then click the Enrollments pane on the left.
3. Use the subheadings under the Enrollments pane to customize the following:
 - Customize the information requested during enrollment, including custom fields.
 - Enter descriptions for your jobs to be displayed on the enrollment form.
 - Customize the text of the enrollment confirmation email.

4

Distributing your enrollment form

Once you've customized your enrollment form and the Web Terminal, you are ready to distribute your Enrollment URL for your volunteers can sign up. The three ways to distribute your Enrollment URL are:

Post the enrollment form as a link on your organization's website

1. Open the Web Terminal pane.
2. Click the "Web Terminal Settings" button, then select Enrollments on the left.
3. Click the "Copy..." button next to your Enrollment URL.
4. Post the link on your organization's website.

Email the enrollment form to a list of contacts using your own email program

1. Copy the Enrollment URL using the steps above and paste it into an email that introduces your event and invites the recipients to sign up online.
2. It is considered best practice to "BCC" emails to long lists of people, instead of including all addresses in the "To" field, in order to keep individual email addresses private.

WebTerminalSettings

General

Enrollments

- General info
- Jobs
- Locations
- Shift preferences
- Serving frequency
- Unavailable times
- Assignments
- Notes

Assignments

Swap Requests

Profile Changes

Auto Reminders

Administrators

"From" Address

Sign-in Kiosk

Allow volunteers to submit enrollment forms

Enrollment URL: www.rotundasoftware.com/volunteer/vspfestival?enroll=1 Copy URL...

Put a "Sign up now" link to the enrollment form on the Web Terminal login page

Customize the text at the top of the enrollment page...

Automatically process enrollment forms (i.e. create volunteer or re-activate existing)

Send an email when an enrollment form is processed to the volunteer who was enrolled

Subject:

Bcc these emails to me (or to the "From" address)

(For additional settings related to Enrollments please click on a subcategory to the left.)

4

cont'd

Import contacts into VSP and email them the enrollment form from the Announcements pane

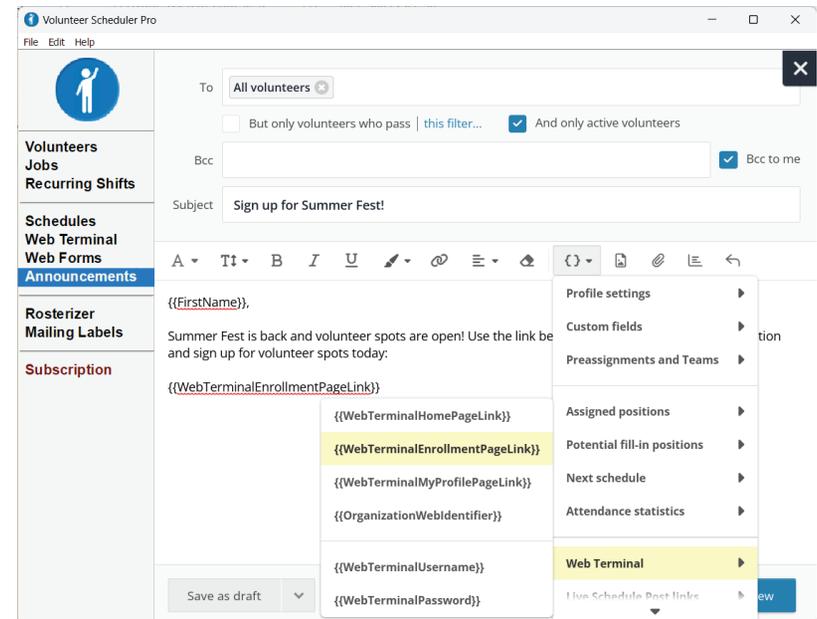
Import volunteer contact information and custom fields from a .txt, .csv, .xls or .xlsx file. We recommend importing one spreadsheet per job so you can quickly qualify volunteers for their jobs during import.

[Watch this video](#) to learn how to set up a spreadsheet and import your volunteers.

1. Go to File - Import Volunteers
2. Add the fields from the available fields column to the fields to import column in the order they appear on your spreadsheet
3. Optionally qualify everyone from the spreadsheet in a particular job
4. Click "Import" and choose your spreadsheet

Send your volunteers an email with the enrollment form through the Announcements pane. (NOTE: You can draft but not send Announcements during the 15 day free trial.)

1. Open the Announcements pane.
2. Click the "+" button in the upper right and select "Email."
3. Compose an email inviting the recipients to enroll.
4. Insert the Enrollment URL by clicking the "{{Token}}" button, selecting "Web Terminal", and choosing "{{WebTerminalEnrollmentPageLink}}".
5. Click the "Preview" button, and select a volunteer to see the populated email.



Conclusion

Congratulations! You have completed the setup work of entering your jobs, creating a schedule, and adding volunteers. You should now have a clearer idea of how VSP can work for your organization.

For more help getting started with VSP, visit our [Help Center](#). There, you will find:

- [Video tutorials](#) on specific features in the program, including those not covered in this guide, such as how to print the schedule, customize the online layouts, and send text messages
- [Step-by-step instructions](#) for many common questions and setups

Need additional help?

Contact support by sending in your data files (Help - Send Data Files to Tech Support) or call us at 888-877-3640.

We also have guides available [Salvation Army Kettles](#), [Adoration](#), or [events](#).

