

Quick Start Guide for the Salvation Army Kettle Campaign



Volunteer Scheduler Pro

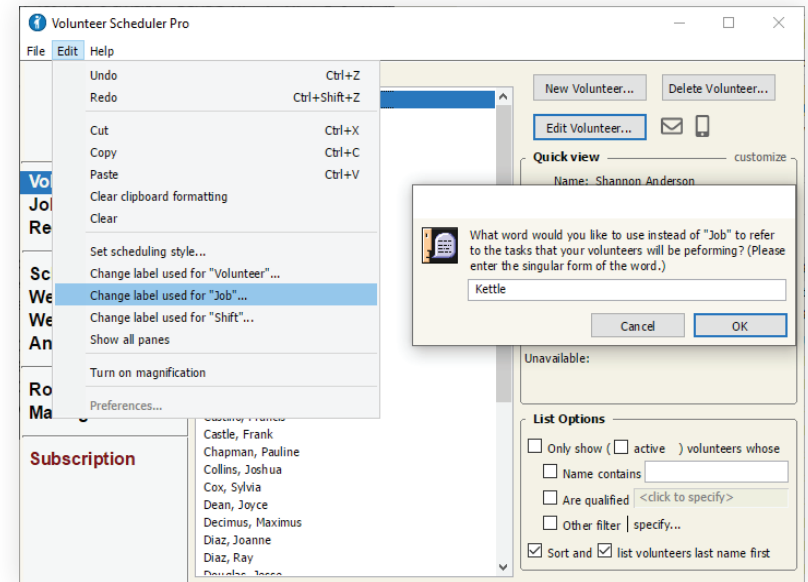
Effective Scheduling Software

1

Define your database

When you launch VSP, it's helpful to re-label the headings on the left-hand side to more accurately reflect Kettle Campaign schedules. We will use the Jobs pane to manage the locations of your kettles.

1. Click the "Edit" menu at the top of the VSP window.
2. Select "Change label used for 'Job.'"
3. Change the word "Job" to "Kettle" (enter the singular form of the word and VSP will pluralize as needed).

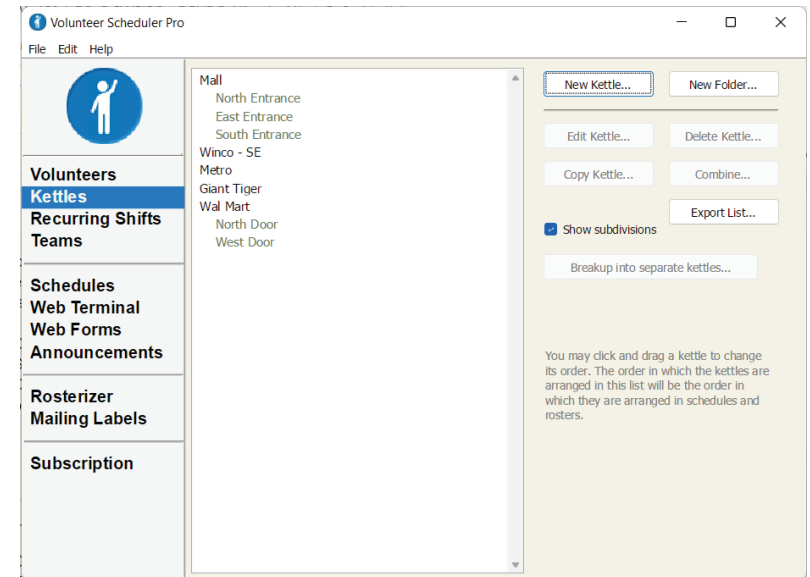


2

Enter your Kettles

For each shift, you will be able to specify how many volunteers should be scheduled for each Kettle.

1. Click on the Kettles pane.
2. Click the “+” button and select “New Kettle.”
3. Add the name of the location.
4. To ensure all volunteers can easily sign up for any location, check the option that says, “Qualify new volunteers for this kettle location by default.”
5. Optionally add subdivisions if there is more than one Kettle at the same location.
6. Repeat this process for each kettle location you will be scheduling.



3

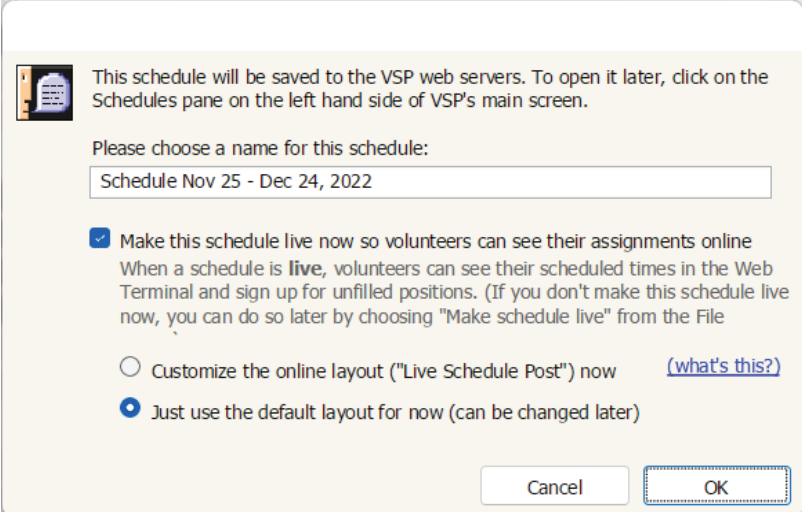
Creating a schedule

After you have entered all your Kettles, 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 Kettle 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 dialog box is titled "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." It contains a text input field for the schedule name, which is currently "Schedule Nov 25 - Dec 24, 2022". Below the input field, there are two radio button options. The first option, "Make this schedule live now so volunteers can see their assignments online", is selected with a blue checkmark. The second option is "Customize the online layout ('Live Schedule Post') now", which is unselected. A link "(what's this?)" is next to the second option. At the bottom right, there are two buttons: "Cancel" and "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:

Schedule Nov 25 - Dec 24, 2022

☒ 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)

Cancel OK

4

Enter your volunteers

“Volunteer” refers to any person who will be scheduled at any Kettle location. There are several ways to go about entering your volunteers:

Manually enter volunteers to customize their complete profile.

1. Click the “+” button on the right side of the Volunteers pane.
2. Add the volunteer name, email, and any other information you want to track about that volunteer.

Import volunteer contact information

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. From the available fields, select the fields to import in the order they appear on your spreadsheet.
3. Choose whether to qualify everyone from the spreadsheet in a particular job.
4. Click the “Import” and choose your spreadsheet.

4

cont'd

Email an online enrollment form to a list of contacts

As people enroll, they are added as volunteers to the database. [Watch this video](#) for a walkthrough of the full enrollment form setup process.

To see 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 "Web Terminal Settings" and then click the Enrollments pane on the left.
3. The Enrollment URL at the top is the direct link to your form, You can click this to view or to send to your volunteers.

TIP

Recommended settings

The remaining settings on the right-hand side of the dialog are used to track volunteer availability and preferences. You will not need to use these sections if you are primarily having volunteers sign up for shifts online. You will only need to use the "Shift preferences" and "Preferred serving frequency" sections if you are using the availability-based rotation model.

5

Scheduling volunteers

VSP accommodates many forms of scheduling, but there are two common methods used to schedule Kettle Campaigns: self sign-up and manual.

Self sign-up: Volunteers sign up for shifts online

1. If you did not already do so above, choose “Make schedule live” from the File menu of the open schedule.
2. Select “Customize the online layout and other options for this live schedule now” and click “OK.”
3. In the Layout Settings pane of the “Online layout and options” dialog, ensure that the “Include unfilled positions in list of volunteers” option is selected so volunteers can see and sign up for the unfilled positions and click “Save” once you have selected any other settings you prefer.
4. You can optionally set up the web forms to be [automatically processed](#) so that the assignments are made in real time as soon as the forms are submitted.
5. Volunteers will now be able to see and sign up for unfilled positions in the Web Terminal.

Manual: Handpick the volunteers you want to serve and get notification of any potential conflicts

1. Open the saved schedule you created in step 3 of these instructions.
2. Click on one of the empty positions in a shift, and you’ll see that the volunteer list on the right side of the window shows the volunteers who are eligible and available to fill the selected position.
3. To fill the position with one of the volunteers in the list, double-click or drag-and-drop the volunteer whom you wish to assign.

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.

Web Terminal settings allow you to further customize how volunteers interact with VSP through the Web Terminal. (NOTE: Web Terminal settings are not available during the 15-day free trial.)

1. Click on the Web Terminal pane on the left-hand side of VSP’s main screen.
2. Click the “Web Terminal Settings” button at the top of the Home tab.

In the dialog that appears, you will find a variety of customization options. Among many other options, you can:

- Customize the text of automatic email reminders
- Turn on automatic text message (SMS) reminders
- Turn on automatic processing for web forms, so that requests that volunteers make through the Web Terminal are processed immediately rather than held for manual processing at a later time.
- Brand the Web Terminal with your organization’s logo
- Customize the profile information that volunteers can update in the My Profile tab. For instance, you can hide the shift preferences and unavailable times areas, or you may include custom fields on the My Profile tab.

6

Giving volunteers online access to the Web Terminal

When you are ready, send your volunteers an email through the Announcements pane to let them know how to log in to the Web Terminal. (NOTE: You can set up Announcements but you cannot send them during the 15-day free trial.)

1. Click on the Announcements pane on the left-hand side of VSP's main screen.
2. Click the "+" button in the upper right and select "Templates" and then "Preconfigured."
3. Select one of the "Introductory email" templates to send your volunteers that will provide them with the link to your Web Terminal homepage and their personal usernames and passwords that are automatically generated for them by VSP. Tokens enclosed in {{curly brackets}} will be replaced with the appropriate information for each volunteer when the email is sent. Feel free to customize the email to best suit your organization's needs – you can add and remove text and tokens as needed by typing into the text box.
4. Click the "Preview" button, then click on a volunteer's name to see how the email will look when sent to each volunteer.

This is a preview. Need to make changes? [Go back](#) to editing mode.

To: All volunteers

Subject: New scheduling system and scheduled dates

Dear Nancy Austin,

We are pleased to announce that we'll be using an online system that allows you to specify the times that do and do not work well for you to serve, check your schedule from anywhere and easily find a substitute when you can't make it. For information and help on how to use this system, please watch this [short video](#) or refer to this [printable guide](#).

After watching the video, you can log in to the "Web Terminal" using the link below.

<https://secure.rotundasoftware.com/29/web-terminal/home?user=VSP>

Username: naustin
Password: 2h1t3h

Don't forget that if you have an [iOS](#) or [Android](#) device, you can use the VSP mobile app! After downloading, you'll need the following Organization ID to sign in: **VSP**
Enter your Web Terminal Username and Password to log in.

Then, all you need to do is open the VSP app to see your scheduled dates, request and accept subs, and update your profile!

Recipients (178 emails)

- Shannon Anderson
- Nancy Austin
- Clifford Baker
- Theodore Beck
- Allen Bennett
- Annie Bowman
- Victoria Bowman
- Angela Bradley
- Patrick Bradley
- Roy Bradley
- Amy Brewer
- Sarah Brooks
- Theresa Brown
- Craig Burke
- Todd Burns
- Laura Campbell
- Martin Campbell
- Earl Carr

☒ Show only final recipients

Back Send to 178 members

We also recommend that you post a link to your Web Terminal's home page on your organization's website so that your volunteers can access their schedules by visiting your organization's site.

1. Go to the Web Terminal pane on VSP's main screen and then click the "Copy URL" button in the top right corner of the pane.
2. Send an email to your organization's webmaster and choose "Paste" from the "Edit" menu to paste the link into the email with a request to post it on your site.

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](#).

