

## Getting Started:

- If you have an event you have used in the past that you would like to run again, use the Copy or Reuse buttons. This will copy the layout and settings of your previous event, without keeping any of the volunteers from the last time.



- Name your Event

Event Name: \*

- Choose your Event Dates

- Fill in when your event starts and ends.
- Fill in when your volunteers can begin signing up for your event, and when they will no longer be allowed to sign up.

Event Start Date: \*

Event End Date: \*

Signup Start Date: \*

Signup End Date: \*

- Self Cancellation Settings

- Make sure to set how you want your volunteers to be able to interact with their slot after they have signed up.

Self Cancellation Ends:

- Self Cancellations Are Not Allowed
- Midnight At End of Task/Slot Date(s)
- Midnight At Start of Task/Slot Date(s)
- 12 Hours Prior
- 1 Day Prior
- 2 Days Prior
- 3 Days Prior
- 4 Days Prior
- 5 Days Prior
- 6 Days Prior
- 7 Days Prior
- Other Days Prior
- ✓ Specific Date

## Designing Your Event:

### Signup Sheet Design

#### Tasks

- Choose the type of task you would like to create.
  - If your task lasts a week or more, you may want to use the "Spans 1 or more weeks" or "Calendar" options.

Type:  
Create a blank Task

- Create a blank Task
- Create a Task that spans 1 or more weeks
- Create a Task that represents a calendar month

#### Task Date Option

- Reminders, Thank You emails, and reports are based around the Task Date Option, so be sure to double check that it properly reflects your needs!

Task Date Option:  
Task is on one day

- Task is on one day
- Task spans Event dates (no specific date)  
Dates are in Column Headers  
Dates are in Row Headers  
Dates are in each Slot Position

#### Rows and Columns

- We recommend using Rows and Columns for jobs within a task, shifts, time slots, and to create new tasks to represent larger jobs within the event.

Number of Columns:  Number of Rows:

#### Custom Prompts

- Custom Prompts allow you to find out more information from your volunteers that you may need for your Task, Event, or Organization.

Custom Prompts

Custom Prompts

Add Prompt

#### Instructions

- Check the different instruction areas to make sure your volunteers know how to sign up, what the event is about, and the jobs they are signing up for.

#### Adding images and Logos

- To add a Logo, you can use the Settings > Logo tab to upload an Event Logo. The Event Logo will show up anywhere the variable [EVENT\_LOGO] appears.

Set Logo...

- Use the button on the Text Editor for adding an image.



#### Terminology

- You can change the way you refer to your volunteers using the Settings > Display tab.

Terminology - Participant Actions (Verbs):

Volunteer, Volunteered, Volunteering

## Emails:

### ☐ Settings

- ☐ Check your verification and confirmation emails.
- ☐ All the email types are found in the Settings > Emails tab of your event. Check to see which ones are going to be sent to your volunteers when your event is active.

#### Who Receives Administrative Notification Emails?

	On Confirmation	On Cancellation	When Reminders/ Emails are Sent	On Reply or Bounceback
Organization Administrators *	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Event Administrators *	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Event Contact	Hourly <input type="button" value="v"/>	Hourly <input type="button" value="v"/>	Immediately <input type="button" value="v"/>	Hourly <input type="button" value="v"/>

\* Set how frequently Administrators receive email under *Organization > Details* and *Organization > Administrators*.

### ☐ Templates

- ☐ Edit the templates to make sure the emails say what you want them to say to your volunteers. This is where you can add extra instructions to Reminder Emails, images to confirmation and verification emails, extra information about the event, and more.

#### Administrator/Contact Notification Emails

Confirmation Notification Template

Cancellation Notification Template

#### Volunteer Emails

Email Verification Template Email Verification Mode: Verification Required Once

Preempted Notification Template

Confirmation Notification Template  Always send Confirmation Notification to participant

Cancellation Notification Template

Reminder Template Slots in the future to include as part of the Reminder: 4 days

Thank You Template  Thank only Signed-In participants when Track Attendance is enabled

Scheduled emails go out about: 12  : 00  AM

### ☐ Schedules

- ☐ Now that your emails are ready, you can manage your email schedules.

