DonorSnap
Donor Management Made Easy

# Best Practices for Managing Volunteers

You may use two different parts of DonorSnap to track volunteer-related information:

- **Volunteer Tab** for **when** they work and the **Hours** for that day
    - Track *specific to that day* information such as work performed
    - Run reports of all the hours a person worked
    - Run reports of all the volunteers at an Event
    - **Reports > Volunteer Activity by Event** is a pre-built report for you, by Event. Or use **DataMinerPlatinum** to build a custom report.

- **Contact Tab** Information for their **Interests**, skills/credentials, availability, etc.
    - **Create fields** to track Interests, such as specific events or “kids activities” vs. “computer lab” – so when you need volunteers, you can run a report of those that have signed up
    - **Create fields** to track “Credentials” such as “CPR certified”
    - **Create fields** for “Photo Release” or “Background check”

Add fields created/edited under **Maintenance > Site-Setup > User-Defined Setup**
**Watch the help video for User Defined Setup**

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## Create Volunteer-Related forms for your Website

You can create a form in DonorSnap, put it on your website…. When someone submits the form, it will create new activity (such as Volunteer hours). This can be linked to an existing DonorSnap record or used to create a new Contact.

**Online Forms** is a menu option along the top of the program (for example, Community, Reports, Processing, Online Forms). If you do not see it, make sure it is turned on in your User Security (**Maintenance > User Setup >** Click the specific user **> Rights**)

Forms are essentially an extension of the database, so they are directly related to tabs in the database.

### Volunteer Sign-In

Create a Volunteer Sign-In form in DonorSnap. Put it on your website.
Now your volunteers can access your website and log their own hours! Put a computer station at your Event and volunteers can add their hours before they leave!

**Online Forms > Standard Forms > Add** – Choose the template for Volunteer Sign-In
Use the tabs along the top (Settings, Header/Footer) to customize the look of your form.
Customize the **Fields** on your form to include **Hours, Event Code**, and **Date** (which will create new activity on the **Volunteer** tab of their record), and any Contact information to reference the contact such as First/Last, Email, Phone, Address, etc.

## Register to Volunteer

Create a "Register to Volunteer" form in DonorSnap. Put it on your website.
Now contacts can sign-up to volunteer for specific events.

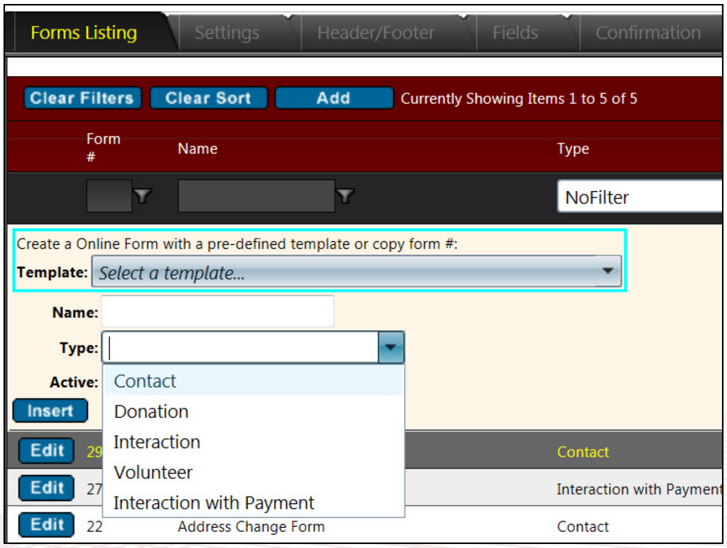
A Volunteer registration form is related to information on the **Contact** screen such as:

- Volunteer Interests – where they would like to volunteer
- Skills/Credentials – are they CPR certified?
- Availability – a drop-down that lists certain times such as Saturday morning, Evenings, etc.

****You MUST build add these fields to the database before building your form**. Remember, the form directly relates to tabs in your database, so the field has to exist before it can be added to your form.

Any fields such as where they <u>would LIKE to volunteer</u> is more a classification of Who They Are (therefore Contact-tab information), as opposed to what work they did that day (Volunteer-tab activity).

**Online Forms > Standard Forms > Add**.... Choose a **Contact** form



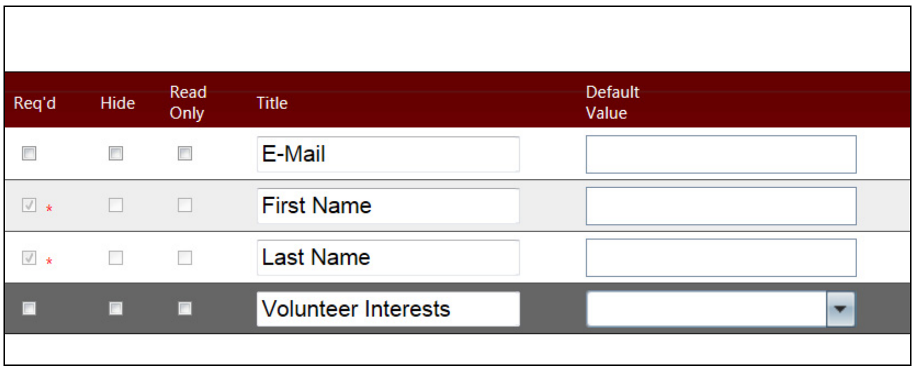

Skip over the template field (there is not a template for Volunteer Registration)
**Name** your form.
Select **Contact** from the **Type** field.

Use the tabs along the top (Settings, Header/Footer) to customize the look of your form.

Customize the **Fields** on your form.

- Pull over those fields you've created for Volunteer Interests and/or Availability, whatever fields you need about this Volunteer.
- Add any contact fields for First/Last, Email, Phone, Address, etc. so you can create a new contact or you can update an existing contact.

Remember that you can **Rename** any fields for the way they'll display on the form in the Title column.
For example, pull in your created "VolunteerInterests" field:




Now click on the Volunteer Interests field and rename it to something more personal such as, "Where would you like to volunteer?"
When the information gets processed in DonorSnap it updates the "VolunteerInterests" field, but to your contact on your website, the field appears more personal.

## Add Volunteers as Users of DonorSnap

You can have unlimited users of DonorSnap, and each user can have different Security settings. For example, create a User for your Volunteer Coordinator. They can access the program and log volunteer hours, but limit the security to only that function (ie. Remove their access to financial data and/or financial reports).

**Maintenance > User-Setup**
**Add** a new user. Assign their security as **User (Read-Write)**. Set their username and password and **Save**.

Now click that name to highlight it on the list and go to the **Rights** tab.
Here you can modify their individual User Rights to **Read-Write** on the Contact screen (so they can add volunteers and volunteer information, update addresses, etc.) and Volunteer Tab (so they can add Volunteer hours); and **No Access** to the other tabs of the database. On the left, UN-check the boxes for reports and other functions.