Managing the Weekly Schedule Serve Team Leader Perspective

From the Website

Create the Week:

1. Go to Schedules & Plans on the left hand side. It has a clock icon.
2. Click on your Category (serve team name).
3. Click +Create Week(s) on the right hand side.
4. Checkmark all the weeks you would like to work on. Click Add. You are now ready to manage volunteers.

Control Number of Volunteers for the Week:

1. In the week, use the gear icon and toggle on “Same people serve at all serving times.” Click Proceed.
2. From each position, click the + until the desired number of volunteers display for each team/position.
3. Use the gear icon and toggle off “Same people serve at all serving times.”
4. If there are differences in volunteer needs per service, you can now set the number per service time.

Add/Remove volunteers:

1. Click on the Schedules & Plans tab on the left.
2. Click on your category.
3. You can click on a week to manage or +create weeks, click the appropriate boxes and hit add to add more weeks.
4. From here, click “add volunteers” in blue to fill your schedule. You can add by name or, if they are existing in the position, check the box beside their name and click add.
5. Use the ellipses to the right of the volunteer’s name to change their status, remove them, or preview their profile.

Send Requests to Volunteers:

- You can use this notification feature when you are finished building your schedule for the timeframe. This will send both an email and a text message when applicable, that allows them to review their volunteer opportunities.

From the Schedule view, you can email all or a portion of your volunteers.

1. Click Actions in the top right corner. Message Volunteers.
2. Filter in “Includes Recipients From:” by their status, serving time, or which team/position if there is more than one.
3. On the Recipients line you can click and see how many and whom your message will go to, and you can uncheck individuals as desired.
4. From there you can form your message, attach files, etc.

5. When you hit send, the email will be sent immediately.

<u>From the LEAD. app</u>

Create the Week:

1. Go to Schedules on the bottom menu bar.
2. Click on your category.
3. Click +Create Week(s) in blue.
4. Checkmark the dates you would like to work on. Click add in the top right corner.

Add/Remove Volunteers:

1. From the week you are managing, click add volunteers (in blue) to add by name or search for an individual. Click Add (#) in the top right corner.
2. Click on a current volunteer to change status, view profile, or remove.

Notify Volunteers:

1. On your week schedule, click the top three dots in the right hand corner. Click Send Requests.
2. Choose Pending (not notified) to inform, or choose Pending and notified to remind, or both. Click Next.
3. Modify the body of the message as you wish. A stock message is provided. Click Send. This will be sent to the volunteers email address on file.

OR

1. On your week schedule, click the top three dots in the right hand corner. Click Message Volunteers.
2. Here you can filter by their status, (Accepted, Pending, Declined, or Checked-In [you would use this if you are managing a past week]) service time, and team/position. Leave checked whom you would like to contact. Click Next in the top right corner.
3. Add a subject and message body. Click Send in the top right corner. This will be sent to the volunteers email address on file AND as a text message if we have a mobile number and carrier on file.

Tips:

- You cannot change the number of needed volunteers through the app, but a number will display in red when there aren't enough volunteers assigned or the volunteers do not have a status of "accepted" or "check-in."
- If a volunteer has a red triangle appear, that either means that the position requires a valid background check and it needs to be reviewed OR they have blocked out dates and are otherwise unavailable for serving. Hovering over the red triangle should give you more details.