



## **Volunteer Impact – The Basics!**

*Read more at <http://www.betterimpact.com/help/>*

**Login to your crew account at:  
[admin.betterimpact.com](http://admin.betterimpact.com)**

### **Housekeeping:**

- Info about Better Impact
  - Canadian
  - Utilized by multiple not-for-profit organizations (City, Alberta health, Winnipeg Folk Fest)
  - Secure and encrypted data all the time
  - 24/7 support
- The goal – Lighten coordinators' admin load, and help them connect more easily with their volunteers!
  - You will probably still need to contact your volunteers directly, but now they can access and maintain their own info.
  - There are lots of features the Festival won't be using at this point. This guideline goes over the items we'll be focusing on.
- First up – Let's update your file! Use the quick search bar to pull up your name; check your contact info (including photo), login information, Custom Fields and Miscellaneous tabs.

## The 'Main' Menu

Add a **welcome message** to your crew from the 'Home' page (click 'Edit' to add your message)

**Your Current Volunteer Message**

Hi All Traffic Crew Volunteers,

I am learning this new feature just like you. It could take a while for us older hold outs from technology to catch on but here goes!!

I just want to know if you are coming back on the crew this year (yes, no or next year).

- If yes; are you able to do the early shift 3:00 PM to 6:15 PM on both the Thursday and Friday. You will also have two shifts on Saturday and two shifts on Sunday which will be determined by the coordinators.
- Those that can't do the early shift will be on the 6:00 PM to 9:15 PM shift on both the Thursday and Friday. You will also have two shifts on Saturday and two shifts on Sunday which will be determined by the coordinators.
- One half of the crew will also need to do a fun shift on teardown at the site after the festival.

More information will come as we get closer to the festival dates (August 4-7).

Thanks,  
Paul

[Clear](#) [Edit](#)

name in the quick search bar (upper right) to bring up your profile.  
[? View your volunteers - Tune in their name in the](#)

**Support**

[Member Support](#) - Search our knowledge base and send us your support questions.  
1-800-844-1545

**Feedback**

[How can we make our software better?](#)

**Get Social**

**Better Impact**  
1,062 likes  
"I just love volunteer management software on the cloud!"

**Switch to Volunteer View from the main menu** – This is your personal volunteer page, and is the landing page for volunteers logging in from MyVolunteerPage.com. Click 'Switch to Administrator View' to return to your admin page.

## The 'People' Menu

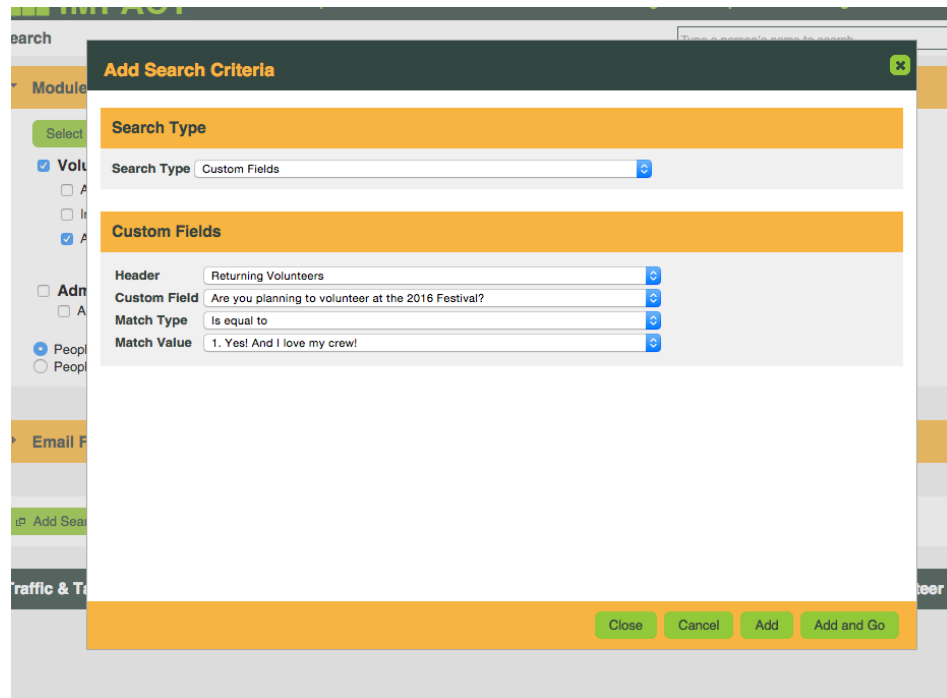
**Search** – Select the type of volunteer you'd like to search for (accepted, etc.), then add additional search criteria as needed. If you just want to bring up your crew, select 'Accepted' then 'Search'.

Eg. Who has indicated that they're returning?

1. Search Type – *Custom Fields*
2. Header – *Returning Volunteers*
3. Match Type – *is equal to*
4. Match Value – *Yes! And I love my Crew!*

If you're finished adding search criteria, select 'Add and Go' from the bottom right of the window. If you want to add more, select 'Add' and continue adding search terms until you're ready.

Once you've searched, you can add or alter it at any time by adding or deleting criteria.

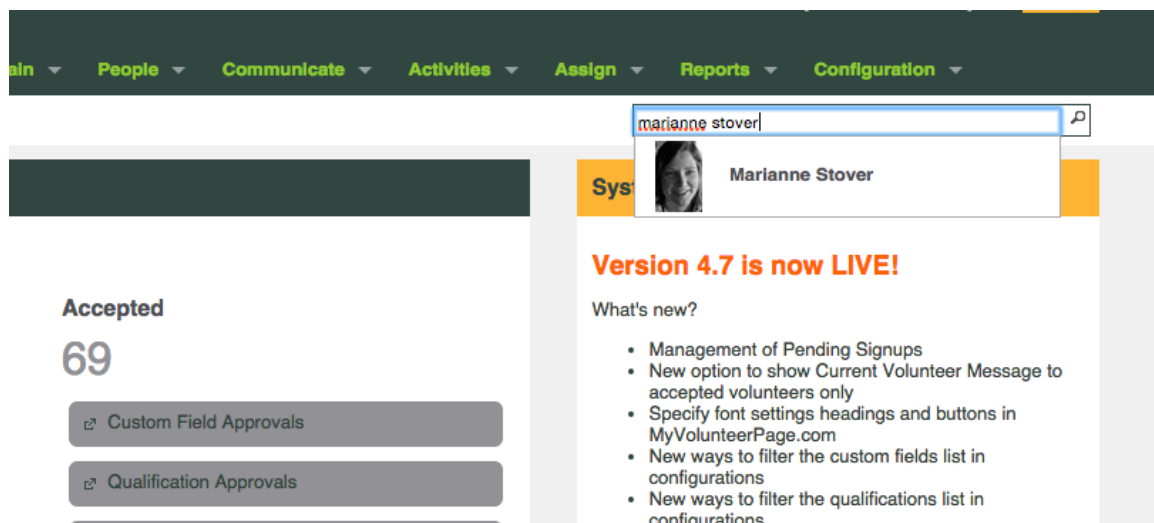


Already know who you're looking for? Use the **quick search bar** in the upper right of your admin screen.

Start by typing the first few letters of the person's name. Once it pops up, click on their name to bring up their file.

You can bring up and edit your personal file from the quick search bar – Admins do not need to log in from MyVolunteerPage.com to update their info.

The quick search bar is at the top right under the overall headings:



**Editing someone's file from a search** – Hover over the black square (to the left of a person's name) and select 'Edit'. You can move through the headings in their file, save if you make changes, then close the window and go back to your search results.

You can also send an email to the person while you are in their file – Move to the 'Communications' heading and proceed with the email, view emails you've previously sent, or add a personal message that they'll see when they log in to *MyVolunteerPage.com*.

## The 'Communicate' Menu

*For all info on sending emails and communications, visit <http://www.betterimpact.com/help/email-send/>*

From the 'Communicate' menu, select 'Send Email'. From there, perform a search as per above to bring up the group of people you'd like to email. Click the 'Search Results' bar to pull up all the people in the search – These are the people your email will go to. Unclick anyone you don't wish to send to.

### ***Where do emails go?***

When you send an email from the system, it goes to the volunteer's inbox (whatever email address(es) they have on file). It will come from the email you have on file, which means if they reply, it will come directly to your email inbox (ie. the system does not have a built in messenger.).

### ***BCC?***

This means 'blind carbon copy'. Each admin creates their own contact list (eg. The Volunteer Office ([volunteers@edmontonfolkfest.org](mailto:volunteers@edmontonfolkfest.org)) or fellow coordinators.)

***Do volunteers see who a group email was sent to?*** Nope! Everyone is auto BCC'd.

***Request a read receipt*** – You'll receive a message once the volunteer has opened the message.

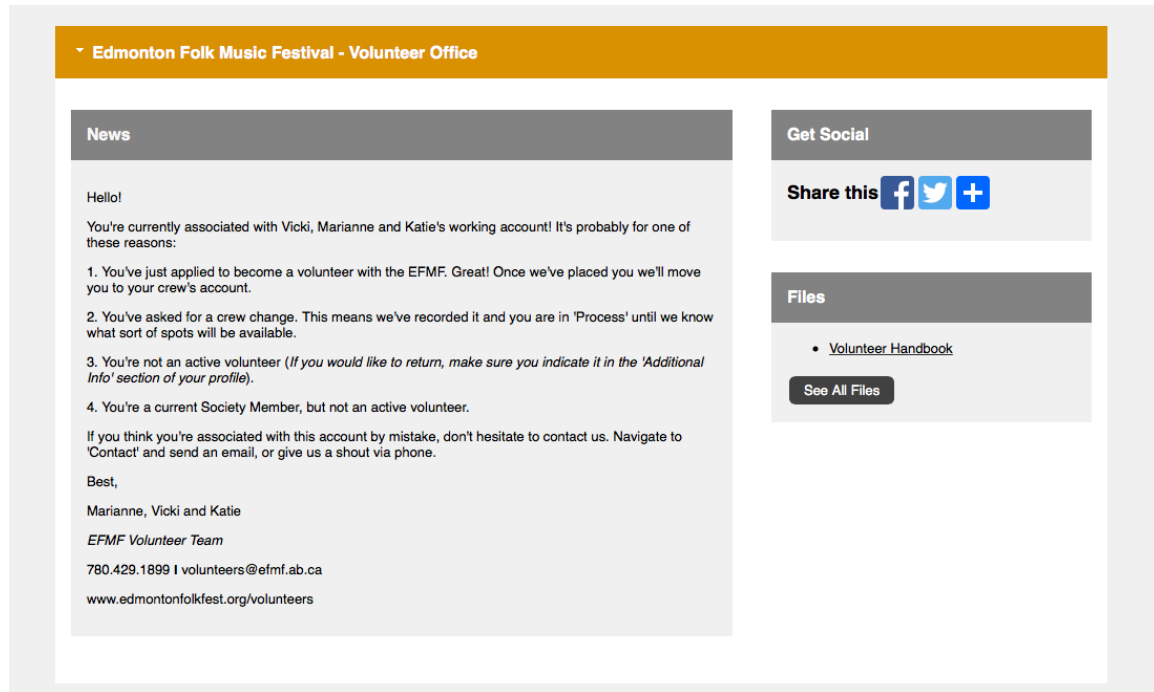
***Send a copy to myself*** – We highly recommend turning this on for each email you send. You'll get a copy in your inbox with a list of people the message was sent to.

Be aware that any bounce backs due to incorrect emails, etc. will come to your inbox.

***Can I save a draft email?*** – No! Don't move away from the page unless you're finished. If it's an email you send often, consider creating an 'Email Template' from the Communicate menu.

# The 'Configuration' Menu

**Document Library** – Add any documents (eg. your crew manual) here, and select 'Highlight on MyVolunteerPage.com' so that your volunteers can view the file.



## Managing Volunteer Profiles

**The biggest thing to remember – Save your changes!**

### *Main*

- Contact Info section – The basics. Volunteers can update this anytime.
- Custom Field (aka. Additional Info) section – EFMF fields; you can modify any of these; they can modify most personal details. Save your changes!
- You can also manage coordinator roles as they apply to badges in the 'Current Crew Info' section. Coordinator changes must be approved by the Volunteer Office. Keep us in the loop!
- Communicate – Send emails, personal messages, view past sent emails
  - Email History – This only shows emails you have sent to the person. You cannot view history from other coordinators.
- Miscellaneous – Change Status (Accepted, Inactive+ or Archived+)

**General Availability** – You don't have to use this, but you could ask volunteers to fill out this section if it's specific enough for your uses.

**Qualifications** – We have basic questions here. Need us to add something specific to your crew? Ask!

# Admin preferences – Your Profile

- In 'Miscellaneous' → Add an email signature – Include your email address, crew and phone number
- Admin settings – Choose preferences for notifications, contact availability (suggest only one admin as contact otherwise it may confuse volunteers)
  - Administrator Roles are managed by the Volunteer Office. Contact us to make any changes.

▼ Administrator

**Status**  
Active

**Administrator Role**  
Type Limited  
Limited Administrator Role Coordinator

**Admin Settings**

**Communications**

**Notifications**

- Change in activity availability notifications
- Declined shift assignment notifications
- Volunteer status change notifications
- New volunteer application notifications

**Contact Person**

- This person is a contact person for the organization and will be available for volunteers to email on MyVolunteerPage.com

**Email Signature**

Edit ▼ Insert ▼ View ▼ Format ▼ Table ▼

☰ ☰ ☰ ☰ ☰ Font Family ▼ Font Sizes ▼ A ▼ A ▼ ↕

**Schedule**

Number of Days to Display  <sup>max</sup>

Display Option  ↕

Save

# Activities – Creating your schedule

## *What is an Activity?*

An activity is a task, assignment or position to which a volunteer can be assigned. It can also be used to create a scheduled event, such as training sessions or crew meetings. Activities that have something in common (eg. 2016 Festival) can be grouped into categories.

Go through the steps (with videos!) here -

<http://www.betterimpact.com/help/new-activity-1/>

1. 'Activities' menu → 'Manage Activities'
2. Select '+ New Category' if you want to organize your activities → We suggest organizing by year but it's not required. Down the road it may help keep things organized for you.
3. Select '+ New Activity'
  - a. Fill in Activity Name and Category (Don't worry about the rest) 'Next'
  - b. Selecting a type of activity → Highly suggest 'Recurring Pattern', then save as a template. This way you won't need to enter everything every year.
  - c. Add the days and times of your schedule. Then select 'Save as Template' and give it a name.
  - d. Make sure you adjust the pattern range below. (ie. If your shift schedule covers the four days of Festival, make it the dates of the current year's Festival). 'Next'
  - e. We suggest making your schedule *visible* to accepted volunteers. They can't sign up, but they could send you their availability based on your prepared schedule.
  
  - f. Turn off self-scheduling (maybe we'll get there eventually...)
  - g. Turn off auto lock as it relates to self scheduling 'Next'
  - h. Ignore qualifications for now. 'Next'
  - i. Ignore Feedback Fields for now. 'Next'
  - j. Ignore Classifications. 'Save'
4. Editing an activity:
  - a. Hover over the black square of the activity you wish to edit. Select 'Edit'
  - b. Click on the tab category you wish to edit (add a shift, delete a shift, etc.)
    - i. *Hack!* You can copy activities that you've previously created. From there, follow the instructions in step b to rename the activity, move it's category, add and delete shifts. Year to year, you should be able to simply copy previous activities, updating the date range and category (fingers crossed!).

Notes on Activities and Scheduling:

- If you have pre-Fest stuff, consider creating a separate activity to keep things organized. You should also create activities for each role where possible (ie. shift leader shifts, runner, etc.).
- Have accepted volunteer be automatically scheduled for your crew meeting and any other required time.
- Assigning Volunteers to 'Activities':  
[http://www.betterimpact.com/help/assign-volunteer-from-profile-schedule-volunteers/ - gsc.tab=0](http://www.betterimpact.com/help/assign-volunteer-from-profile-schedule-volunteers/-gsc.tab=0)