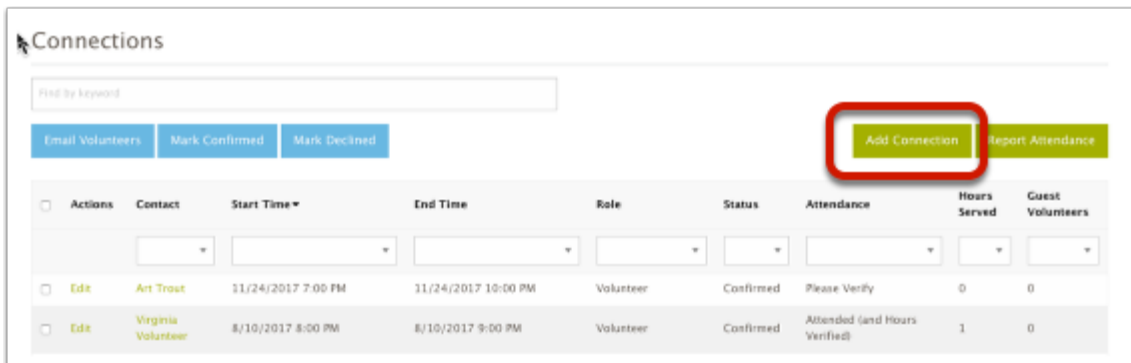


Administratively Adding Connections

There are a number of circumstances in which you might want to administratively add one or more connections for your existing volunteers. You may want to schedule them for additional dates (occurrences) of date and time specific opportunities, or you might want to schedule them for additional connections for your Individually Scheduled Opportunities. Here's how to administratively create new connections:

In Volunteer Opportunity Detail View go to the connections grid and click on the Add Connection button



The screenshot shows the 'Connections' section of a web application. At the top, there is a search bar labeled 'Find by keyword'. Below it are three buttons: 'Email Volunteers', 'Mark Confirmed', and 'Mark Declined'. To the right of these buttons is a green button labeled 'Add Connection', which is highlighted with a red rectangular box. Further right is another green button labeled 'Report Attendance'. Below the buttons is a table with the following columns: Actions, Contact, Start Time, End Time, Role, Status, Attendance, Hours Served, and Guest Volunteers. The table contains two rows of data. The first row shows a contact named 'Art Trout' with a start time of 11/24/2017 7:00 PM and an end time of 11/24/2017 10:00 PM. The second row shows a contact named 'Virginia Volunteer' with a start time of 8/10/2017 8:00 PM and an end time of 8/10/2017 9:00 PM.

Actions	Contact	Start Time	End Time	Role	Status	Attendance	Hours Served	Guest Volunteers
<input type="checkbox"/> Edit	Art Trout	11/24/2017 7:00 PM	11/24/2017 10:00 PM	Volunteer	Confirmed	Please Verify	0	0
<input type="checkbox"/> Edit	Virginia Volunteer	8/10/2017 8:00 PM	8/10/2017 9:00 PM	Volunteer	Confirmed	Attended (and Hours Verified)	1	0

For a date and time specific Opportunity:

- 1) Search for a contact, and choose them from the list. (Note, you can only create connections for volunteers who already have a connection to your organization.)
- 2) Choose an Occurrence Date (you can search by date, or choose from the picklist)
- 3) Choose an Attendance Status (for future dates the attendance status should always be "Please Verify", for past dates choose either "Attended" or "Not Attended").
- 4) Optionally indicate if there are guest volunteers.
- 5) Hours Served: Leave blank for future dates, if a past date and attended, put in the number of hours of service.

Click Save:

Add Connection

Volunteer Opportunity
English as a Second Language

Contact *

Occurrence *

Attendance Status *
Select Option ▼

Guest Volunteers

Hours Served

Contacts

Search by name to quickly filter. Then click on the contact you wish to create the connection for.

Name ▲	Email Address	Profile Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Valencia Volunteer	troutco+9001val@gmail.com	Volunteer
Valerie Volunteer	director@troutco.com	Volunteer

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For Individually Scheduled Opportunities (ISOs)

For ISOs there is only one occurrence, but you can create multiple connections for a contact if desired. Let's say you want to schedule Valerie Volunteer to come every Monday from 2:00 pm - 4:00 pm from Feb 1 to March 31. Here's how you'd do it:

Add Connections

Volunteer Opportunity
 Cleanup Crews Needed

Start Date
 2/16/2017 12:01 AM

End Date
 3/31/2017 11:59 PM

Days/Times available

- Monday: 9:00 AM - 11:00 AM
- Friday: 2:00 AM - 4:00 AM

Contact Information

Contact *
 Valerie Volunteer

Recurrent Schedules of Days

Day of the Week *
 Select Option

Start Time *
 9:00 AM

End Time *
 9:00 AM

Add Day & Time

Actions	Day of the Week	Start Time	End Time
Remove	Monday	2:00 PM	4:00 PM

What is the period of time the contact will volunteer for the days and times you've listed above?

Start Date *
 2/1/2018

End Date *
 3/31/2018

Save Cancel

1) The top part of the screen shows you the existing schedule you've chosen for this opportunity. (however, as an administrator, you can schedule volunteers for any day or time, despite the published schedule. However - you cannot create connections that are earlier than the listed start date or later than the existing end date. (If you want to schedule connections for a date later than the end date, first edit the occurrence and extend the end date!)

2) When you select a day of the week, start time and end time, you must then click on the Add Day & Time button (3) so that it appears in the grid below (4). In this way, you could also schedule Valerie for Tuesdays (and other days), click add day and time, and you would be scheduling for multiple days of the week all at once. If you make a mistake and add a wrong day of the week, click on the 'remove' link to remove a day and time before you save the connection.

5) Once you've selected the day(s) and times, you specify the time period you are creating the connections for. By default, it will list the earliest possible date and the latest possible end date -- but you probably do not want to create connections across that entire time period! So be sure to edit the Start Date and End Date for the time period you want to create the new connections for. They can be in the past, the future, or a combination of the two.

Then click on SAVE, and all these connections will be created.

- ❗ • You cannot create more than 90 connections at one time. So limit the number of connections you wish to create.
 - If you only wish to create ONE connection, then choose the day and time, and then set the start and end date to that one date. Then only the one connection will be created.
 - The connections you create will automatically be in confirmed status. Volunteers will receive an email if you administratively create connections for them for future date(s).
 - For connections created for past dates - the connections will automatically be marked confirmed and attended. (We assume you aren't adding connections where someone wasn't attended :-)
- This saves you the trouble of verifying attendance when you administratively create connections for past dates.