



Waubonsie  
Valley  
Athletic  
Boosters

## ***VolunteerSpot Organizer FAQs & Instructions***

### ***What is VolunteerSpot?***

VolunteerSpot is a simple, mobile and web-based tool used by the WVHS Athletic Boosters Club to organize volunteers. It is easy to use and enhances communication about volunteer opportunities to support athletic programs for our students. VolunteerSpot offers:

- Easy scheduling wizard for tasks to do and/or supplies to bring
- Recruitment for a single day event, multiple day activity, or no specific day responsibility
- Invitations via email or shared link via listserv, newsletter, website, Facebook, or Twitter
- Simple, self-managed volunteer sign-ups via 24/7 computer and mobile access
- Easy sync to Outlook, Google, iCal or Cozi calendar
- Automatic confirmation messages and two-day advance reminders to volunteers
- Automatic notifications of activity changes and/or cancellations by organizers
- Automatic weekly status reports and notifications of late cancellations by volunteers

### ***I've volunteered as a Team Coordinator – What does that mean?***

As a Team Coordinator, you will be designated as an organizer and be responsible for staffing concession stands with volunteers during home games. Rest assured, the WVHS Athletic Booster Concession Directors and Volunteer Coordinator will assist you every step of the way! In VolunteerSpot, you will be able to add, delete, and modify tasks on the volunteer calendar; send invitations to potential volunteers; assign volunteers manually, if needed; receive automatic notifications; send thank-you notes; monitor unfilled jobs; and recruit additional people as needed.

### ***What should I do first?***

Visit [www.volunteerspot.com](http://www.volunteerspot.com) to register with VolunteerSpot and activate your account so the WVHS Athletic Booster Volunteer Coordinator can add you to an activity as an organizer. If you have not used VolunteerSpot before, click **Help** to access video tours and quick tips.

### ***What do I do next?***

Once added as an organizer, log in to VolunteerSpot and click **MyActivities** to see the activities you organize. Click on an activity's name to edit that activity. Note: VolunteerSpot has two types of activities. Scheduled activities appear in calendar format and have specific dates/times associated with them (e.g. concession jobs). Projects appear in list format and are jobs that volunteers can do on their own time (e.g. committee chair assignments).

MOST IMPORTANTLY,

(1) **ALWAYS** CLICK **CLOSE & UNLOCK** WHEN YOU EXIT AN ACTIVITY.

(2) **NEVER** DELETE AN ACTIVITY.

# Instructions

All organizer tasks require you to log in to VolunteerSpot using your organizer email and password.

I want to...	Step-by-Step Instructions
<b>Register for a VolunteerSpot account</b>	<ol style="list-style-type: none"> <li>1. Visit <a href="http://www.volunteerspot.com">www.volunteerspot.com</a></li> <li>2. Click "Register"</li> <li>3. Under "Choose an action", select "Register Organizer Account"</li> <li>4. Complete the form <ol style="list-style-type: none"> <li>a. Under "Organization Type", select "Booster Club/PTA"</li> <li>b. Leave promotion code blank</li> <li>c. Uncheck "I want to receive special offers and promotions..."</li> </ol> </li> <li>5. Select "Register for Complimentary"</li> <li>6. VolunteerSpot will email a link you must click to activate your account</li> </ol>
<b>Add an activity or organizer</b>	Contact the WVHS Athletic Boosters Volunteer Coordinator at <a href="mailto:volunteer@wvhsboosters.org">volunteer@wvhsboosters.org</a> . All activities and organizers must be initiated by the Volunteer Coordinator to ensure access to premium features.
<b>Add a task to a day without any tasks</b>	<ol style="list-style-type: none"> <li>1. Click "MyActivities"</li> <li>2. Select the activity to edit</li> <li>3. Select "Click To Plan" on the date where you wish to add the task</li> <li>4. Select "Plan this Day"</li> <li>5. Select "Add a TO DO Task"</li> <li>6. Name the task</li> <li>7. Select how many people can sign up</li> <li>8. Specify the time for the task (optional)</li> <li>9. Briefly describe the task (optional)</li> <li>10. Click "Save"</li> <li>11. Repeat Steps 5 – 10 to add more tasks to the day, if needed.</li> <li>12. Click "Save"</li> <li>13. Plan additional days, if needed.</li> <li>14. Click "Close &amp; Unlock" to exit the activity once your edits are finished</li> </ol>
<b>Add a task to a day with existing tasks</b>	<ol style="list-style-type: none"> <li>1. Click "MyActivities"</li> <li>2. Select the activity to edit</li> <li>3. Click on the date where you wish to add the task</li> <li>4. Select "Make Changes"</li> <li>5. Select "Add a TO DO Task"</li> <li>6. Name the task</li> <li>7. Select how many people can sign up</li> <li>8. Specify the time for the task (optional)</li> <li>9. Briefly describe the task (optional)</li> <li>10. Click "Save"</li> <li>11. Repeat Steps 5 – 10 to add more tasks to the day, if needed.</li> <li>12. Click "Close &amp; Unlock" to exit the activity once your edits are finished</li> </ol>

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<p><b>Copy a day to a new day in the same activity</b></p> <p><b>Caution:</b> The copy function overwrites the entire day. Any existing “to-dos” on the date you copy to will be lost.</p>	<ol style="list-style-type: none"> <li>1. Click “MyActivities”</li> <li>2. Select the activity to edit</li> <li>3. Click the date you wish to copy</li> <li>4. Select “Copy”</li> <li>5. On the small blue calendar that opens, click on the date(s) to copy to. If you click on a date in error, click on the date again to unselect it. Click the boxes above the days of the week to copy your day to all days of the week you select (e.g. all Mondays). Click the boxes to the left to select all days in one week (e.g. Sunday – Saturday). Click the arrows next to the month/year to change months.</li> <li>6. Make sure the “Copy To” box says “This Activity”</li> <li>7. Click “Copy”</li> <li>8. Click “Close &amp; Unlock” to exit the activity once your edits are finished</li> </ol>
<p><b>Copy a day from one activity to another activity</b></p> <p><b>Note:</b> You need to be an organizer for <u>both</u> activities.</p> <p><b>Caution:</b> The copy function overwrites the entire day. Any existing “to-dos” on the date you copy to will be lost.</p>	<ol style="list-style-type: none"> <li>1. Click “MyActivities”</li> <li>2. Select the activity for the date you want to copy</li> <li>3. Click the date you wish to copy</li> <li>4. Select “Copy”</li> <li>5. On the small blue calendar that opens, click on the date(s) to copy to. If you click on a date in error, click on the date again to unselect it. Click the boxes above the days of the week to copy your day to all days of the week you select (e.g. all Mondays). Click the boxes to the left to select all days in one week (e.g. Sunday – Saturday). Click the arrows next to the month/year to change months.</li> <li>6. Under “Copy To”, select the activity you want to copy this day to</li> <li>7. Click “Copy”</li> <li>8. Click “Close &amp; Unlock” to exit the activity once your edits are finished</li> </ol>
<p><b>Delete a task</b></p> <p><b>Note:</b> Volunteers will receive auto-cancellation notices regarding changes from VolunteerSpot.</p>	<ol style="list-style-type: none"> <li>1. Click “MyActivities”</li> <li>2. Select the activity to edit</li> <li>3. Click the date with the task you wish to remove</li> <li>4. Select “Make Changes”</li> <li>5. Click on the red “<b>X</b>” to the right of each task you wish to remove</li> <li>6. Click “Save”</li> <li>7. Click “Close &amp; Unlock” to exit the activity once your edits are finished</li> </ol>
<p><b>Delete a day</b></p> <p><b>Note:</b> You will need to notify volunteers of an event cancellation.</p>	<ol style="list-style-type: none"> <li>1. Click “MyActivities” and select the activity you wish to edit</li> <li>2. Click “Message” to the left of the activity calendar</li> <li>3. Write a note, choose message recipients by day, and click “Send”</li> <li>4. Click the date you wish to delete and select “Delete”</li> <li>5. Click “OK” if you want to remove that day</li> <li>6. Click “Close &amp; Unlock” to exit the activity once your edits are finished</li> </ol>

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I want to...	Step-by-Step Instructions
<b><i>Change/Edit a day</i></b>  <b>Note: Volunteers with time changes to their tasks will be automatically notified within 1hr.</b>	<ol style="list-style-type: none"> <li>1. Click "MyActivities"</li> <li>2. Select the activity to edit</li> <li>3. Click the date you wish to change or edit</li> <li>4. Select "Make Changes"</li> <li>5. Click "Edit" to the right of the task</li> <li>6. Make your changes to one or more of the elements defining the task (e.g. name, number of people, start/stop times, or description)</li> <li>7. Click "Save" (Repeat if more tasks on the same day need editing)</li> <li>8. Click "Save" when finished</li> <li>9. Click "Close &amp; Unlock" to exit the activity once your edits are finished</li> </ol>
<b><i>Move an entire day</i></b>	<ol style="list-style-type: none"> <li>1. Follow steps to <b><i>"Copy a day to a new day in the same activity"</i></b></li> <li>2. Then follow steps to <b><i>"Delete a day"</i></b></li> </ol>
<b><i>Move a task from one day to another</i></b>	<ol style="list-style-type: none"> <li>1. If tasks already exist on the day, follow steps to <b><i>"Change/Edit a day"</i></b></li> <li>2. If not, follow steps to <b><i>"Add a task to a day without any tasks"</i></b></li> <li>3. Then follow steps to <b><i>"Delete a task"</i></b></li> </ol>
<b><i>Change Activity Name, Event Location, or Welcome Message</i></b>  <b>Note: Changes take effect when activity is closed &amp; unlocked.</b>	<ol style="list-style-type: none"> <li>1. Click "MyActivities"</li> <li>2. Select the activity to edit</li> <li>3. Click "Details" on the green tab above your activity calendar</li> <li>4. Click "Make Changes"</li> <li>5. Click each box to edit or add text. Be brief. There are character limits for each field. You will be notified when those are reached.</li> <li>6. Click "Save"</li> <li>7. Click "Close &amp; Unlock" to exit the activity once your edits are finished</li> </ol>
<b><i>Change Organizer Name, Title, or Phone</i></b>  <b>Note: Changes take effect when activity is closed &amp; unlocked.</b>	<ol style="list-style-type: none"> <li>1. Click "MyActivities"</li> <li>2. Select the activity to edit</li> <li>3. Click "Organizer" on the green tab above your activity calendar</li> <li>4. Select the organizer to edit</li> <li>5. Click appropriate box to edit name, title, or phone number.</li> <li>6. Click "Save"</li> <li>7. Click "Close &amp; Unlock" to exit the activity once your edits are finished</li> </ol>
<b><i>Change Volunteer Name, Email, or Phone</i></b>  <b>Note: Changes take effect when activity is closed &amp; unlocked.</b>	<ol style="list-style-type: none"> <li>1. Click "MyActivities"</li> <li>2. Select the activity to edit</li> <li>3. Click "Volunteers" on the green tab above your activity calendar</li> <li>4. Select the volunteer to edit</li> <li>5. Click appropriate box to edit a name, email, or phone number.</li> <li>6. Click "Save"</li> <li>7. Click "Close &amp; Unlock" to exit the activity once your edits are finished</li> </ol>

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I want to...	Step-by-Step Instructions
<p><b>Invite people to volunteer</b></p> <p>Note: Volunteers will be sent confirmations upon sign-up and two-day advance reminders automatically.</p> <p>A person will be asked for an email address and taken directly to your sign up when a sharable link is clicked.</p> <p>Since anyone can sign up using a sharable link, it is your responsibility to screen and approve volunteers.</p>	<p>There are two easy ways to invite potential volunteers to sign up once your activity has been set.</p> <p>(A) Personal Invitation: If you have a manageable list, enter email addresses or copy/paste from a spreadsheet into the wizard, up to 50 at a time.</p> <ol style="list-style-type: none"> <li>1. Click "MyActivities" and select the activity to edit</li> <li>2. Click "Invite" to the left of the activity calendar</li> <li>3. Enter or copy email addresses into the "To:" box.</li> <li>4. Compose your message to potential volunteers. Note: Your message cannot exceed 1024 characters. Feel free to revise the standard language offered by VolunteerSpot.</li> <li>5. Click "Send Invitations"</li> <li>6. Click "OK" on the "Your invitations will be sent out shortly" pop-up</li> <li>7. Click "Close &amp; Unlock" to exit the activity</li> </ol> <p>(B) Shared Link: If you have an unwieldy list, paste a Sharable URL Sign-Up Link in your own email message, WVHS listserv, Athletic Boosters Club newsletter or website.</p> <ol style="list-style-type: none"> <li>1. Click "MyActivities"</li> <li>2. Select the activity to edit</li> <li>3. Click "Create a Link" to the left of the activity calendar</li> <li>4. Just copy and paste the code or text as directed.</li> <li>5. Click "Close &amp; Unlock" to exit the activity</li> </ol>
<p><b>Add volunteers manually</b></p> <p>Note: You may add as many volunteers as there are slots to fill. Volunteers with new jobs will be automatically notified within 1hr.</p>	<ol style="list-style-type: none"> <li>1. Click "MyActivities" and select the activity to edit</li> <li>2. Click the date you wish to assign the volunteer</li> <li>3. Select "Make Changes"</li> <li>4. Click "Assignments" to the right of the specific task</li> <li>5. Select "Click Here to Add a Volunteer"</li> <li>6. If the person's name is already listed, click their name</li> <li>7. If it is not, click "New Volunteer" and enter name, email and phone (optional) in the "New Volunteer" pop-up box, then click "Save"</li> <li>8. Click "Save", then "Close" in the pop-ups that appear</li> <li>9. Click "Close &amp; Unlock" to exit the activity</li> </ol>
<p><b>Delete volunteer assignments</b></p> <p>Note: Volunteers with cancelled jobs will be automatically notified within 1hr.</p>	<ol style="list-style-type: none"> <li>3. Click "MyActivities" and select the activity to edit</li> <li>4. Click the date you wish to assign the volunteer</li> <li>5. Select "Make Changes"</li> <li>6. Click "Assignments" to the right of the specific task</li> <li>7. Click the red "X" for the volunteer assignment you wish to delete</li> <li>8. Click "Save", "Save", then "Close" in the pop-ups that appear</li> <li>9. Click "Close &amp; Unlock" to exit the activity</li> </ol>

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<p><b>Check the accuracy or status of the activity calendar</b></p>	<p>There are many easy ways to check the accuracy or status of your activity.</p> <p>(A) Invite Yourself</p> <ol style="list-style-type: none"> <li>1. By inviting yourself to your activity, you can see information from a potential volunteer's perspective.</li> <li>2. Follow steps to <b>"Invite People to Volunteer"</b></li> <li>3. After you invite yourself, click "My Invitations" to see your activity</li> </ol> <p>(B) View Status By Day (most time-consuming)</p> <ol style="list-style-type: none"> <li>1. Click "MyActivities" and select the activity</li> <li>2. Click the date you wish to view</li> <li>3. Click "View Status" to see the day's tasks and who has signed up and how many spots are filled. You may print or close without printing.</li> <li>4. Click "Close &amp; Unlock" to exit the activity when finished.</li> </ol> <p>(C) Create a Report</p> <ol style="list-style-type: none"> <li>1. Click "MyActivities" and select the activity</li> <li>2. Click "Reports" to the left of the activity calendar</li> <li>3. Select a roster, specific day, or month to view and print.</li> <li>4. Use your browser's print commands to complete printing</li> <li>5. Close the report view, then click "Close" in "Reports"</li> <li>6. Click "Close &amp; Unlock" to exit the activity when finished.</li> </ol> <p>(D) Export Activity to Excel</p> <ol style="list-style-type: none"> <li>1. Click "MyActivities" and select the activity</li> <li>2. Click "Export" to the left of the activity calendar</li> <li>3. Click "Open" to view the activity in an Excel spreadsheet</li> <li>4. Or, click "Save File" and "OK" to download the file, selecting a name, location and file format of your choosing</li> <li>5. Click "Close &amp; Unlock" to exit the activity when finished viewing.</li> </ol> <p>(E) Check your Inbox for Weekly Status Emails from VolunteerSpot</p> <ol style="list-style-type: none"> <li>1. VolunteerSpot will send Friday Status Reports via email providing you with a preview of scheduled tasks for the upcoming week. The preview will list volunteers for every task by day and time in the upcoming week along with comments, if any. If nothing is scheduled, no preview will be sent.</li> <li>2. VolunteerSpot will send Last-Minute Cancellation Notices via email if a volunteer cancels within 2 days prior to their commitment.</li> </ol>

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I want to...	Step-by-Step Instructions
<i>Send a message or thank you using VolunteerSpot</i>	<p>VolunteerSpot makes it easy to send a message or say “Thank You” to those who volunteer.</p> <ol style="list-style-type: none"><li>1. Click “MyActivities” and select the activity</li><li>2. Click “Thank You” or “Message” to the left of the activity calendar, depending upon what type of message you wish to send</li><li>3. Select recipients by response status, by date, or individually</li><li>4. Click “Save List”</li><li>5. Customize your message. Note: It cannot exceed 1024 characters.</li><li>6. Click “Send Message” and “OK” on the pop-up</li><li>7. Click “Close &amp; Unlock” to exit the activity</li></ol>

***Thanks for making a difference! Go Warriors!***

Robin Church  
WVHS Athletic Boosters Volunteer Coordinator  
(630) 499-9899  
[volunteer@wvhsboosters.org](mailto:volunteer@wvhsboosters.org)

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