

HOW TO MAKE A VOLUNTEER SIGN UP FORM

GETTING STARTED

Login to calvinleetepto.membershiptoolkit.com and then click on: **Dashboard-->Volunteers-->Active Forms-->New Volunteer Form (blue button)**

If you've already started working on your form and you'd like to edit it, click on: **Dashboard-->Volunteers-->Active Forms-->your form's name (instead of New Volunteer Form -->Edit this form**

If you've already made a form for another event and it would be *perfect* for your new event: **Dashboard-->Volunteers-->Active Forms-->your form's name (instead of New Volunteer Form -->Edit this form-->Duplicate Form (yellow button)**. Then you can change the title and anything else you need, but still have a lot of things already set up for you instead of making them from scratch.

SETTING UP YOUR FORM

There is text for you to change/add on these tabs:

- **Overview** – the **title** of your form and a short description that's listed under it in the forms menu. Set the **publish date** for when you'd like people to be able to start signing up. Set the **unpublish date** for the day after your event so your form disappears from active view on the home page.
- **Presentation** – input all the text that appears at the top of your volunteer page here. There are also **pull down boxes** for you to choose **how many volunteers** you need and whether or not to **show who/how many** have signed up already.
- **Email** – this is for the **auto-reply** that is sent to everyone who signs up on your form. (Usually a “thank you” note for volunteering and a promise of more info to come as the event date nears.)
- Be sure to click “save” after you've made all your text changes.

There are good descriptions next to all of these boxes telling you exactly where the text will appear on your form.

ADDING VOLUNTEER JOBS AND/OR TIME SLOTS

It works best to **create only one form** for your event or project so you only need to check one place to see who has volunteered.

- If you have an **event with separate volunteer jobs** (like the Legomania or the Tag Sale), use the blue **“add new section” button to separate and group the jobs**.
- If you have an event where **all the jobs are the same** (like the School Store), use the **“add opportunity” button for each day** you need volunteers (or just click it once and then click the blue **“add multiple” button** next to it and you

- can enter all the days you need volunteers at once.)
- Make **each day** (or separate job) a **new opportunity** and then give it multiple opportunity slots (time slots).
 - **Enter your volunteer shift times in the “Displayed as...” box.** You’ll want to be sure to **add a Start Date/Time** in the box for the opportunity so you can send reminder emails later.

For an example of an event with separate volunteer jobs, click on the form [Sample – Sock Hop Volunteers](#) .

For an example of an event with all the same jobs on different days, click on the form [SCHOOL STORE VOLUNTEER SIGN-UP](#).

TESTING YOUR FORM

If you'd like to see how it looks while you are working on your form, go to the Overview tab and change the Mode box to "TEST". Then you can open another window of the toolkit site and look up the form from your home page like other people will see it.

SETTING UP REMINDER EMAILS FOR VOLUNTEERS

You'll want to send reminder emails to your volunteers so they don't forget when they signed up... or that they signed up at all! You can also use this to send a thank you email to everyone after your event.

Dashboard-->Volunteers-->Active Forms-->your form's name-->ticklers (blue button)->add tickler (blue button)

Note: at the "Volunteer Opportunity" level, make sure to include a start date for the opportunity. The reminder email times are set based on this information. If these fields are blank, the email will not be sent. You can have multiple reminder ticklers for each form.

Status box

Select Draft, Active, or Inactive (draft for while you're working on it, active for when you're done and ready to send)

Send Tickler box

- **Relative** - Use this option if you only want to send an email to a group of volunteers that are scheduled for a particular day. For instance, if you have a schedule that covers Monday - Friday, you may want the reminder to go to

the Monday volunteers on Sunday, the Tuesday volunteers on Monday, etc. You will set the number of days in advance or following a particular time slot and the time of day you want the email to be sent.

- **Absolute** - Use this option when you want to send an email to the entire group of volunteers on a specific day and time. (This is the thank you option!)

From box

This is the email address the tickler will come from. You can select from a list of Admins on your site.

Subject box

The subject line of the email. Always include the words “Calvin Leete” so people know it’s from school and they will open it!

Body

This is where you put what you want the tickler to say. You can add macros (first name, last name, etc.) to the email to help personalize the information included. To add a macro, click on the appropriate one when you are ready to add it to your message.

PUBLISHING YOUR FORM

When you are completely done with the form, go to the Overview tab and change the Mode box to "ACTIVE" and the form will appear on everyone's home page so they can sign up.

Membership Toolkit has a help page (its link is the word “help” on your dashboard menu). Here is their tutorial page on how to make a volunteer form:

<https://membershiptoolkit.freshdesk.com/support/solutions/articles/14857-creating-a-volunteer-form>

Here is their tutorial page on creating tickler emails:

<https://membershiptoolkit.freshdesk.com/support/solutions/articles/210191-volunteer-tickler-emails>