


# Agency Introduction

As an Agency, you will use VS to recruit individuals and groups to volunteer at your organization. You can create and post descriptions of openings for volunteers to help with date-specific and ongoing tasks ([opportunities](#)), both for your organization's specific needs as well as for [community events](#) organized by Administrators. You can then follow up on and track responses from prospective volunteers (called [referrals](#)). If an Administrator has enabled time-tracking, you can also record [volunteer hours](#) completed by individual volunteers matched to your opportunities, and/or approve volunteer hours claimed by volunteers themselves.

In order to use VS, you will need to [register](#) with the **Volunteer Center** hosting VS in your community. Registration is free, although an Administrator will need to review and approve your registration before you can begin using your Agency account. Administrators will also review any opportunities you create before they are posted in VS for viewing by volunteers.

The topics in this section will help you better understand and use VS. They should be used in conjunction with the **Help** icons (  ) found within VS. You can also [contact a Volunteer Center Administrator](#) for additional help in using VS.

## Getting Started

The primary way you will use VS as an Agency after your registration has been approved will be for creating and posting volunteer opportunities and following up with the volunteers that respond. This typically involves you:

Step 1: Creating a volunteer opportunity to be posted in VS, either for a specific organization need you are trying to fill and/or as a project for a community event. An Administrator will review your new opportunity and (if it is acceptable) approve and post it in VS.

Step 2: Responding to and tracking referrals from volunteers interested in the opportunity.

Step 3: Reviewing and approving volunteer hours claimed by volunteers for the opportunity, and/or logging the hours yourself (if time-tracking has been enabled by an Administrator).

# Getting Help

Should you need help in using VS, you can contact an Administrator at the Volunteer Center that hosts VS in your area.

To contact an Administrator from within VS:

1. Find and click on the link at the bottom of the VS page labeled **Contact [Name]**, (where **[Name]** is the name of the Volunteer Center). This link should be available whether you are [logged into your Agency account](#) or not.
2. Select and use one of the four contact methods for contacting an Administrator: phone, fax, email, or using the provided Web form.

# Introduction to Managing Your Agency Account

As an Agency, you will work with VS using the tools provided in your Agency account. You obtain an Agency account by [submitting a registration form](#) to an Administrator. When the Administrator approves and activates your account, you are free to [modify](#) the information and settings in your account, begin [creating volunteer opportunities](#), and start [tracking referrals](#) and [volunteer hours](#).

You can [make changes to your Agency account](#) at any time. In addition, you will need to [renew your Agency account](#) after an elapsed amount of time specified by an Administrator (typically after 12 months), or your account will expire.

The topics in this section will cover registering for a new Agency account and maintaining it once it is approved and activated.

# Registering/Creating an Agency Account

To use VS to recruit and manage volunteers, you will need to register your organization with VS. An Administrator will review your registration application, and if he/she finds it to be satisfactory, will activate your Agency account.

To register with VS to obtain an Agency account:

1. Find the VS page on the Website of your local Volunteer Center.

2. Find and click the link in the **Login** section labeled **We have a separate login for agencies**.
3. On the **Agency Login** page, click the **Register here!** link in the **New Agencies** section.
4. Review the information provided on the **Agency Sign Up** page, then type in your organization's name in the **Agency Name** box (this is required) and click **Sign Up!**
5. Review the information displayed on the **Terms and Conditions** page, as well as the legal information obtained by clicking the **legal notices** link at the bottom of the page. If you agree to these terms of use, click **I Agree; continue**.
6. Fill in the form on the **Add Agency Listing** page with the requested information. Entries are required in certain fields; these will be marked with an asterisk (\*). When finished, click **Save and continue**.
7. VS may offer suggestions for improving your Agency listing. If it does, and you wish to make any of the suggested changes, click **Review listing to make suggested changes**. If you do not wish to make changes, click **Continue with no additional changes**.
8. VS will next offer you the option of uploading your organization's logo. You can [upload the logo](#) at a later time, if you do not wish to do so now or do not have a logo prepared. If you wish to upload your logo, click the **Browse . . .** button on the **Upload logo** page, find and select the logo on your computer or network using the dialog box provided, and when returned to the **Upload logo** page click **Upload my logo**. Note that the logo file you use must be limited to 50 kilobytes, and must be in a GIF, JPEG, or PNG file format. This means a logo size of about 200 x 200 pixels (about 2.5 inches by 2.5 inches). If you do not wish to upload your logo at this time, click **I do not want to upload a logo**.

VS will create a new Agency account for you and display the **Overview** tab of its **myHome** page with a note indicating that your registration will be reviewed by an Administrator before it is activated. Note that the tools and settings for your account are grouped by VS into several tabs (the number of which you see may be different from the screenshot below, depending on option features an Administrator may or may not have enabled). Note also the **Quick Links** tool on the **Overview** tab, which provides shortcuts to commonly used Agency tools by making a selection from the drop-down menu and clicking **Go**. Finally, note the **Tasks** section of the **Overview** tab. VS will display links in the **Tasks** section to prompt you to take particular actions, such as updating an expiring opportunity listing or [renewing your Agency account](#).

*\*Please note that the Events, Board Connections, Product Connections, and Hours tabs are not available in the VS Mini edition.*

## Best Buddies Oregon - PVC Demo

myHome



-- Select Action --

**Tip: Add your date-specific opportunities to the volunteer calendar. Simply click on the date-specific opportunity, then click on "Edit dates". Some volunteers look to our online calendar first!**

*Registration date: Jan 12, 2007*

### Tasks

- ▶ [Upload your organization's logo](#)
- ▶ [Follow up on 2 referrals](#)
- ▶ [Provide information for your Executive Director](#)

### General Administration

- ▶ [View statistics on your listings](#)
- ▶ [Learn about the Community Spotlight](#)
- ▶ [Link to your listing](#)
- ▶ [Change Password](#)

## Best Buddies Oregon - PVC Demo myHome



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Tip: Add your date-specific opportunities to the volunteer calendar. Simply click on the date-specific opportunity, then click on "Edit dates". Some volunteers look to our online calendar first!

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### General Administration

- ▶ [View statistics on your listings](#)
- ▶ [Learn about the Community Spotlight](#)
- ▶ [Link to your listing](#)
- ▶ [Change Password](#)

You can [update your Agency account](#) at any time. In addition, you will need to [renew your Agency account](#) after a time period specified by an Administrator, typically after 12 months, after which your account will expire.

## Logging in to Your Agency Account

After your Agency account has been approved, you can log into it at any time and from any computer connected to the Web.

To log into your Agency account:

1. Find the VS page on the Website of the Volunteer Center you registered with.
2. Find and click the link in the **Login** section labeled **We have a separate login for agencies**.
3. In the **Registered Agencies** section, type in the name and password you used when you registered your Agency. If you have forgotten your password, you can click the **Forgot your password?** link to have it sent to you.
4. Click **Go!**

VS will log you in and display your **myHome** page, from which you can manage your account settings, opportunities, referrals, and volunteer hours.

## Updating Your Agency Listing

You can update the information about your organization contained in your Agency listing (the general description of your organization provided to volunteers). For example, if your organization moves its offices to a new location, you may wish to update your Agency address in VS.

In addition, you will be prompted by VS eventually to [renew your Agency account](#), typically 12 months after creating it, or your account will expire.

To update your Agency listing:

1. Log in to your Agency account (see [Logging in to Your Agency Account](#) for instructions, if needed).
2. When VS displays your Agency's **myHome** page, find the **Agency Listing** tab near the top and click it.
3. Find the section containing the information in your Agency listing you would like to update, and click the link provided for modifying this information. For example, to change your organization's mailing address, click the **Edit Mailing Address** link in the **Mailing Address** section at the bottom of the page. If you would like to review the Agency listing as it will appear on VS, click the **See the listing as volunteers see it** link at the top of the page.
4. Follow the provided instructions for modifying the section of the Agency listing you wish to change.

## Renewing Your Agency Listing

You will be prompted by VS to renew your Agency listing after an interval specified by an Administrator, typically every 12 months. If you or another Agency contact do not renew the listing, it will expire. This feature encourages Agencies to check their accounts to make sure the information is current, and keeps volunteers, board, candidates, and donors from contacting agencies whose accounts are dormant.

VS will prompt you to renew your listing by displaying a link in the **Tasks** section of the **Overview** tab of your Agency account displayed when you [log in](#). You or the Agency contact that has been [assigned to the Agency listing](#) will also receive a renewal notice from VS by email.

To renew your Agency Account:

1. Log in to your Agency account (see [Logging in to Your Agency Account](#) for instructions, if needed).
2. When VS displays your Agency's **myHome** page, find the **Agency Listing** tab near the top and click it.
3. On the **Agency Listing** page, in the **General Administration** section, find and click the **update** link.
4. Review the listing information displayed. If any information is inaccurate or out of date, click the **Edit [section]** link for the section with the information you would like to modify (where **[section]** represents the section containing the information to be changed). For example, if you would like to make a change on the list of contacts, click the **Edit/Add Contacts** link (see [Working with Agency Contacts](#) for more information on working with Agency Contacts).
5. If none of the information in a section needs to be changed (or if you have made edits and have returned to the listing information page), click the checkbox provided in the upper left-hand corner of the listing.
6. Repeat Steps 4 and 5 for each section of the listing until all of the check boxes have been clicked.
7. Click the **Update** button.

If the information in each section is accurate, check the box. If there are changes to make, click the edit link. Once you have checked each box, click on the Update button at the bottom of the page.

↓

<input type="checkbox"/>	<b>General Information</b>	<a href="#">▶ Edit general information</a>
<b>Name:</b>	Best Buddies Oregon - PVC Demo	
<b>Parent Organization:</b>	Best Buddies International	
<b>Employer Identification Number (EIN):</b>	95-0000004	
<b>Mission:</b>	Best Buddies is dedicated to enhancing the lives of people with developmental	

If the information in each section is accurate, check the box. If there are changes to make, click the edit link. Once you have checked each box, click on the Update button at the bottom of the page.

↓

<input type="checkbox"/>	<b>General Information</b>	<a href="#">▶ Edit general information</a>
<b>Name:</b>	Best Buddies Oregon - PVC Demo	
<b>Parent Organization:</b>	Best Buddies International	
<b>Employer Identification Number (EIN):</b>	95-0000004	
<b>Mission:</b>	Best Buddies is dedicated to enhancing the lives of people with developmental	

## Uploading Your Logo

If you did not upload a logo when you [created your Agency account](#), you can do so at any time.

To upload your Agency's logo:

1. Log in to your Agency account (see [Logging in to Your Agency Account](#) for instructions, if needed).
2. When your Agency's **myHome** page is displayed, click the **Overview** tab (if it is not already selected).
3. Click the **Upload your organization's logo** link in the **Tasks** section.
4. Click the **Browse . . .** button on the **Upload logo** page to find and select the logo file on your computer or network using the dialog box provided.

Note that the logo file you decide to use must be limited to 50 kilobytes, and must be in a GIF, JPEG, or PNG file format. This means a logo size of about 200 x 200 pixels (about 2.5 inches by 2.5 inches).

5. When returned to the **Upload logo** page, click **Upload my logo**.

VS will take you to the **Agency Listing** page of your Agency account and display the uploaded logo in the **Your Logo** section.

## Changing Your Password

You can change the password you use to log into your VS Agency account.

To change your Agency password:

1. Log in to your Agency account (see [Logging in to Your Agency Account](#) for instructions, if needed).
2. When VS displays your Agency's **myHome** page, click the **Overview** tab (if it is not already selected).
3. Find the **Change Password** link in the **General Administration** section at the bottom of the page and click it.
4. In the **Change Your Password** page, supply your old password (for security purposes), followed by the new password you wish to use.
5. If you wish to use a password question for added security (or change the one you are currently using), in the **Password Question** section select a new question and type in the answer.
6. Click **Okay**.

## Working with Agency Contacts

The **Contact Manager** tool in your Agency account stores the names and contact information for staff members of your organization. You use the **Contact Manager** to keep track of coworkers with access to your Agency account, and/or to [assign them](#) as the primary contacts for opportunities you create.

To access the **Contact Manager**:

1. Log in to your Agency account (see [Logging in to Your Agency Account](#) for instructions, if needed).
2. When VS displays your Agency's **myHome** page, find the **Contacts** tab near the top and click it.

VS will display the **Contact Manager** for your account, which shows all available contacts and the listings they have been assigned to as the primary contact, if any (as indicated with "X's"). This includes both your Agency listing, as well as individual opportunity listings.

## Contact Manager

myHome : Contacts

Overview	Agency Listing	Opportunities	Events	Board Connections	Product Connections
Contacts	Locations	Referrals	Hours		

The following table shows which listings are assigned to which contacts. For each listing (down the left) and each contact person (across the top), an **X** indicates that the person is assigned as a contact for the listing. You can change the contact assignments by using the *Edit* links. You can also **add a new contact**. To view, edit, or delete an existing contact, click on the contact person's name at the top of the table.

	Josel Harrison	Lindy Hurley	
<u>Agency Listing</u>		X <i>(primary)</i>	<u>Edit</u>
<u>Agency Board Info</u>		X	<u>Edit</u>
<u>Network Server</u>		X	<u>Edit</u>
<u>Various Volunteer Opportunities</u>	X		<u>Edit</u>

▶ [Add a new contact](#)

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myHome : Contacts

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	Josel Harrison	Lindy Hurley	
<u>Agency Listing</u>		X <i>(primary)</i>	<u>Edit</u>
<u>Agency Board Info</u>		X	<u>Edit</u>
<u>Network Server</u>		X	<u>Edit</u>
<u>Various Volunteer Opportunities</u>	X		<u>Edit</u>

▶ [Add a new contact](#)

You can use the **Contact Manager** to [add](#), [edit](#), or [delete](#) Agency contacts, as well as [assign them to listings](#).

## Working with Agency Locations

In addition to the main address of your organization, you can record additional addresses in your Agency account for other offices or service sites of your organization where volunteers might be placed. The **Location Manager** stores your Agency addresses and allows you to [assign them](#) as locations to listings (both the main Agency listing and individual opportunity listings).

To access the **Location Manager**:

1. Log in to your Agency account (see [Logging in to Your Agency Account](#) for instructions, if needed).
2. When VS displays your Agency's **myHome** page, find the **Locations** tab near the top and click it.

VS will display the **Location Manager** for your account, which shows all available Agency locations and the number of listings they have been assigned to.

## Location Manager myHome : Locations

Overview	Agency Listing	Opportunities	Events	Board Connections	Product Connections
Contacts	Locations	Referrals	Hours		

Results: 2

	Address	# Records	
1	5731 W. Slauson Ave., Suite 200 Portland, OR 97230 (See a map)	0	<a href="#">Details</a>
2	15950 SW Snowbird Drive Aloha, OR 97008 (See a map)	4	<a href="#">Details</a>

▶ [Add location](#)

## Location Manager myHome : Locations

Overview	Agency Listing	Opportunities	Events	Board Connections	Product Connections
Contacts	Locations	Referrals	Hours		

Results: 2

	Address	# Records	
1	5731 W. Slauson Ave., Suite 200 Portland, OR 97230 (See a map)	0	<a href="#">Details</a>
2	15950 SW Snowbird Drive Aloha, OR 97008 (See a map)	4	<a href="#">Details</a>

▶ [Add location](#)

You can use the **Location Manager** to [add](#), [edit](#), or [delete](#) Agency locations and [assign them to listings](#).

# Linking Your Listings to Other Web Pages

VS is able to create links you can use in Web pages and email messages to give volunteers and others one-click access to your Agency and opportunity listings. VS generates lines of **HTML** code that you copy and paste into email messages

and Web-page source files that will display clickable images linking to (respectively) your Agency listing and current opportunities.

[Detailed Agency Listing](#)

*at Volunteer Solutions*

[View Volunteer Opportunities](#)

*at Volunteer Solutions*

If you are unsure on how to use this feature of VS, you may wish to consult your organization's technical-support staff.

To obtain the HTML code needed to link to your Agency and opportunity listings:

1. Log in to your Agency account (see [Logging in to Your Agency Account](#) for instructions, if needed).
2. On your Agency's **myHome** page, click the **Overview** tab (if it is not already selected).
3. Find the **Link to your listing** link in the **General Administration** section and click it.

VS will display two sets of HTML code; the top one will link to your Agency listing, and the bottom one will link to your opportunities. You can highlight and copy the code for the listing(s) you would like to embed a link to and paste it into email messages and the source files of Web pages.

## Viewing Listing Statistics

VS can track and display for you the number of "hits" (or online visits) your Agency and opportunity listings receive. This lets you determine how visible your organization and opportunities are within VS and which opportunities seem to be most popular with prospective volunteers.

To view the tracking statistics for your Agency and opportunity listings:

1. Log in to your Agency account (see [Logging in to Your Agency Account](#) for instructions, if needed).
2. On your Agency's **myHome** page, click the **Overview** tab (if it is not already selected).
3. Find the **View statistics on your listing** link in the **General Administration** section and click it.

# Introduction to Creating and Managing Opportunities

**Opportunities** are descriptions of date-specific and ongoing tasks at your organization for which you would like to recruit volunteers. You use your Agency account to create and submit opportunities, which are reviewed by a Volunteer Center Administrator and then posted in VS for volunteers to see.

Opportunities you and your colleagues [create](#) are stored in a table on the **Opportunities** page of your Agency account. The opportunities can be filtered using the links at the top of the table to display only **Active Opportunities**, **Inactive Opportunities**, and **All Opportunities**. The **Inactive Opportunities** list contains opportunities that have not yet been approved by an Administrator, opportunities you have [disabled](#), and date-specific opportunities that have expired.

## Aquarium of the Pacific - PVC Demo - Opportunities myHome : Opportunities



[[Active Opportunities](#) | [Inactive Opportunities](#) | [All Opportunities](#)]

Results: 4

Headline	Approval Status	Creation Date	Last Modified	Expires	Type	
<a href="#">Aviculturalist Volunteer</a>	Approved	Jan 12, 2007	Feb 23, 2007	Feb 23, 2008	Ongoing	<a href="#">Details</a>
<a href="#">Education Volunteer: Interpretation &amp; Presentation</a>	Approved	Jan 12, 2007	Jan 12, 2007	Jan 12, 2008	Ongoing	<a href="#">Details</a>
<a href="#">Gift Store Volunteers</a>	Approved	Jan 12, 2007	Jan 12, 2007	Jan 12, 2008	Ongoing	<a href="#">Details</a>
<a href="#">Guest Services Volunteer</a>	Approved	Jan 12, 2007	Jan 12, 2007	Jan 12, 2008	Ongoing	<a href="#">Details</a>

- ▶ [Add a Date-specific Opportunity](#)
- ▶ [Add an Ongoing Opportunity](#)

## Aquarium of the Pacific - PVC Demo - Opportunities

### myHome : Opportunities

[Overview](#)[Agency Listing](#)[Opportunities](#)[Events](#)[Contacts](#)[Locations](#)[Referrals](#)[Hours](#)

[[Active Opportunities](#) | [Inactive Opportunities](#) | [All Opportunities](#)]

Results: 4

Headline	Approval Status	Creation Date	Last Modified	Expires	Type	
<a href="#">Aviculturalist Volunteer</a>	Approved	Jan 12, 2007	Feb 23, 2007	Feb 23, 2008	Ongoing	<a href="#">Details</a>
<a href="#">Education Volunteer: Interpretation &amp; Presentation</a>	Approved	Jan 12, 2007	Jan 12, 2007	Jan 12, 2008	Ongoing	<a href="#">Details</a>
<a href="#">Gift Store Volunteers</a>	Approved	Jan 12, 2007	Jan 12, 2007	Jan 12, 2008	Ongoing	<a href="#">Details</a>
<a href="#">Guest Services Volunteer</a>	Approved	Jan 12, 2007	Jan 12, 2007	Jan 12, 2008	Ongoing	<a href="#">Details</a>

- ▶ [Add a Date-specific Opportunity](#)
- ▶ [Add an Ongoing Opportunity](#)

Volunteers will inquire about the opportunities by phone, email, or fax, which you can track as [referrals](#). If a volunteer is matched to an opportunity, you can [track the hours](#) he or she volunteers for it, and/or review and [approve volunteer hours](#) claimed for the opportunity by the volunteer him- or herself.

## Creating a Volunteer Opportunity

Opportunities are created in VS as either **date-specific** or **ongoing** activities. As their names imply, date-specific opportunities are tied to one or more specific dates and expire when their dates have elapsed, whereas an ongoing opportunity is a task for which you need volunteer assistance on a continual basis that remains posted in VS until you [disable](#) or [delete it](#).

The process for creating opportunities is essentially the same for both types of opportunities, with the exception of date-specific opportunities requiring you to select one or more dates on which the opportunity will be offered. You can [change a date-specific opportunity to an ongoing one](#) and vice versa later on, if necessary.

To create an opportunity:

1. Log in to your Agency account (see [Logging in to Your Agency Account](#) for instructions, if needed).
2. On your Agency's **myHome** page, find the **Opportunities** tab and click it.

3. Depending on the type of opportunity (date-specific or ongoing) you wish to create, click either the **Add a Date-specific Opportunity** link or the **Add an Ongoing Opportunity** link.
4. Supply the information requested in the fields provided in the **Add opportunity** pages, clicking **Save and Continue** to move between pages. Note that fields marked with an asterisk ( **\*** ) are required. Note also that on the first page (**General Information**) you will be prompted to assign a contact and location to the listing using the drop-down menus provided. If you wish to assign a contact and/or location not currently listed in the menus, select **Another Person** or **Another Location** and you will be prompted later in the opportunity-creation process to supply the new contact and/or location (see [Working with Agency Contacts](#) and [Working with Agency Locations](#) for more information about Agency contacts and locations).
5. When you reach the **Geographic location** page, specify whether the opportunity is offered only at the location you specified in Step 4, or is available at multiple locations. If the opportunity will only be offered in the location specified when you began creating its listing, click **No - only this location is available**. If the opportunity will be offered in multiple locations, click instead **Yes, more than one physical location is available**, after which you will be prompted to provide additional location information and click **Save and Continue**.

When finished, VS will display the **Registration Complete** page for the new opportunity, which notes that your opportunity will appear in VS once an Administrator has viewed and approved it.

Opportunity listings to expire after an interval specified by an Administrator. VS will prompt you to update the listing by displaying a link in the **Tasks** section of the **Overview** tab of your Agency account.

## Modifying a Volunteer Opportunity

You can make changes to volunteer opportunities after they are [created](#). The instructions in this topic will describe how to make most of the changes you are likely to make to an opportunity. Some specific changes to opportunities can be made in other ways, and are described in other topics. For example, see [Changing Opportunity Types \(Date-Specific and Ongoing\)](#) for changing a date-specific opportunity to an ongoing one (and vice versa); [Assigning Contacts to Listings](#) for changing contacts for an opportunity using the **Contact Manager**; and [Assigning Locations to Listings](#) for changing locations for an opportunity using the **Location Manager**.

To modify an opportunity:

1. Log in to your Agency account (see [Logging in to Your Agency Account](#) for instructions, if needed).
2. On your Agency's **myHome** page, find the **Opportunities** tab and click it.
3. On the **Opportunities** page, find the opportunity you would like to modify in the table of opportunities and click the **Details** link on the right side of its entry. If the opportunity has expired, is [disabled](#), or has not yet been approved by an Administrator, it is considered inactive; you may have to click the **Inactive Opportunities** link at the top of the table of opportunities to find it.
4. When the **Details** page for the opportunity is displayed, find the section containing the opportunity information you would like to change and click its **Edit** link. For example, to edit the general information of the opportunity (such as the description or requirements), click the **Edit General Information** link in the **General Information** section.
5. Make the desired changes on the pages provided and click **Save and Continue** (or **Continue**) when finished.

## Changing Opportunity Types (Date-Specific and Ongoing)

You can change a date-specific opportunity to an ongoing one and an ongoing opportunity to a date-specific one. If you change an ongoing opportunity to a date-specific one, you will need to assign one or more dates to the opportunity (described in Step 6 below).

To change the opportunity type:

1. Log in to your Agency account (see [Logging in to Your Agency Account](#) for instructions, if needed).
2. On your Agency's **myHome** page, find the **Opportunities** tab and click it.
3. On the **Opportunities** page, find the opportunity you would like to change the type of in the table of opportunities and click the **Details** link on the right side of its entry. If the opportunity has expired, is [disabled](#), or has not yet been approved by an Administrator, it is considered inactive; you may have to click the **Inactive Opportunities** link at the top of the table of opportunities to find it.
4. If the opportunity is currently a date-specific opportunity, on its **Details** page you will see a link labeled **Turn into an ongoing opportunity**. If it is an ongoing opportunity, you will see instead a link labeled **Turn into a date-specific opportunity**. Click this link.
5. When the **Type changed** page is displayed, click the **Back to the opportunity administration** link. You will be taken back to the **Details** page for the opportunity.

6. If you have changed a date-specific opportunity to an ongoing one, you are finished (unless you need to change other information or settings for the opportunity; see [Modifying a Volunteer Opportunity](#) for more information). If you have changed an ongoing opportunity to a date-specific one, you will need to assign one or more dates to the opportunity. On the **Details** page for the opportunity, find the **Upcoming Dates** section, click the **Edit dates** link, and then click the **Add a date** link on the **Event dates** page. Follow the instructions on the **Choose dates** page to select one or more dates for your opportunity.

## Copying a Volunteer Opportunity

VS allows you to make copies of your opportunities. This can help you save time and effort when creating new opportunities by importing information from existing ones.

To copy an opportunity:

1. Log in to your Agency account (see [Logging in to Your Agency Account](#) for instructions, if needed).
2. On your Agency's **myHome** page, find the **Opportunities** tab and click it.
3. On the **Opportunities** page, find the opportunity you would like to copy in the table of opportunities and click the **Details** link on the right side of its entry. If the opportunity has expired, is [disabled](#), or has not yet been approved by an Administrator, it is considered inactive; you may have to click the **Inactive Opportunities** link at the top of the table of opportunities to find it.
4. When the **Details** page for the opportunity is displayed, click the **Create a copy of this opportunity** link.
5. In the **Create a copy** page, you will be prompted to specify which, if any, opportunity information you would like to synchronize between the original opportunity and the copy or copies you are making. This enables you to make changes to the original opportunity or a copy and have the information updated in both at the same time. If you would like to create a completely new and separate copy (or are unsure if you want the original and copy or copies synchronized), select **No** for all options.
6. Click **Create copy**.
7. When the **Listing Copied** page is displayed, click **View original listing** to be returned to the **Details** page for the original opportunity, or **View copy** to be taken to the **Details** page for the copy.

# Disabling a Volunteer Opportunity

You can disable an opportunity, which removes it from viewing by volunteers but saves its information if you would like to [restore it](#) later. For example, if you have an opportunity that has a recurring need for volunteers, you can disable it once you have recruited enough volunteers for the present time and restore it later when you need to recruit the next group.

To disable an opportunity:

1. Log in to your Agency account (see [Logging in to Your Agency Account](#) for instructions, if needed).
2. On your Agency's **myHome** page, find the **Opportunities** tab and click it.
3. On the **Opportunities** page, find the opportunity you would like to disable in the table of opportunities and click the **Details** link on the right side of its entry. If the opportunity has expired or has not yet been approved by an Administrator, it is considered inactive; you may have to click the **Inactive Opportunities** link at the top of the table of opportunities to find it.
4. When the **Details** page for the opportunity is displayed, click the **Disable this listing** link.
5. On the **Disable opportunity** page, click **Yes, disable this opportunity**.

VS disables the opportunity and moves it to the **Inactive Opportunities** section of the table of opportunities on your **Opportunities** page.

# Deleting a Volunteer Opportunity

You can remove from VS opportunities that are no longer used or wanted.

To delete an opportunity:

1. Log in to your Agency account (see [Logging in to Your Agency Account](#) for instructions, if needed).
2. On your Agency's **myHome** page, find the **Opportunities** tab and click it.
3. On the **Opportunities** page, find the opportunity you would like to delete in the table of opportunities and click the **Details** link on the right side of its entry. If the opportunity has expired, is [disabled](#), or has not yet been approved by an Administrator, it is considered inactive; you may have to click the **Inactive Opportunities** link at the top of the table of opportunities to find it.
4. When the **Details** page for the opportunity is displayed, click the **Erase this listing** link.
5. On the **Delete opportunity** page, click **Yes, delete this opportunity**.

# Introduction to Referrals

When a volunteer, board candidate, or donor is interested in a listing you have posted in VS, he or she will get in touch with you to learn more about it. This initial contact is known as an **inquiry** to the sender and as a **referral**.

If a volunteer, candidate, or donor inquires about one of your listings using the inquiry form provided by VS, an email notification will be sent to you (or a colleague if he/she was [set as the primary contact for the listing](#)) and the referral will be recorded on the **Referrals** tab of your Agency account.

The topics in this section will focus on working with email referrals received through VS. However, you should also have (if you do not already) a process in place for tracking, following up on, and managing referrals that come to you by phone, fax, or non-VS-generated emails.

## Tracking Referrals

The **Referrals** tab in your Agency account tracks referrals submitted by volunteers for your opportunity listings, making it easy for you to track and manage them.

To display your Agency's referrals:

1. Log in to your Agency account (see [Logging in to Your Agency Account](#) for instructions, if needed).
2. On your Agency's **myHome** page, find the **Referrals** tab and click it.

The **Referrals** tab displays a table containing your Agency's referrals, which can be sorted within the columns provided by clicking the column headings at the top. You can also filter the referrals using the drop-down menus provided above the table. These tools will be helpful for finding and managing records when your Agency account starts to accumulate large numbers of referrals.

From the **Referrals** tab you are able to [follow up on](#) referrals by email, track and [change the status of referrals](#), and [download referral records](#).

## Following Up on Referrals

Referrals from volunteers, board candidates, and donors should be followed up on promptly. If they have sent their inquiries via email using a form provided by

VS, VS will capture and store the messages so that you can easily track and respond to them.

The easiest way to access new referrals is by clicking a link VS supplies in the **Tasks** section of the **Overview** tab of your Agency account when you are [logged in](#). VS will display a link labeled **Follow up on [number] referral(s)**, where **[number]** represents the number of referrals awaiting review and response.

#### Tasks

- ▶ [Upload your organization's logo](#)
- ▶ [Follow up on 2 referrals](#)
- ▶ [Provide information for your Executive Director](#)

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- ▶ [Upload your organization's logo](#)
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New referrals are also accessible on the **Referrals** tab of your Agency account.

To follow up with a volunteer using the **Referrals** tab of your Agency account:

1. Log in to your Agency account (see [Logging in to Your Agency Account](#) for instructions, if needed).
2. On your Agency's **myHome** page, find the **Referrals** tab and click it.
3. On the **Referrals** page, scan the table of referrals for records that have **Inquired** displayed in the **Inquiry Status** column. When you find one, click the email address of the volunteer provided in the **Email address** column. This will open up your default email application and address a new message to the volunteer. If clicking the link does not open your preferred email application, or does not work, you can also open your preferred email application first and then copy and paste the address provided into it (you can click the **Details** link for the referral to get the full email address of the volunteer if it is cut off in the table of referrals).
4. Repeat as many times as necessary until you have responded to all new referrals.

Once you have responded to a referral, you may want to update its record on the **Referrals** tab to track progress on placing the volunteer (see [Tracking Referrals](#) and [Changing Referral Status](#) for instructions on how to do so).

It is important that you respond to referrals promptly. This is true even in cases where you no longer need volunteers for an opportunity or are not interested in a particular volunteer. A prompt response to a volunteer inquiry builds goodwill and encourages the volunteer to return to you when other opportunities become available and/or recommend you to other volunteers.

# Changing Referral Status

Each referral tracked by VS on the **Referrals** tab is assigned an **Inquiry Status** setting that allows you to indicate at which step you are in moving a referral from inquiry to completion. New referrals are automatically set to **Inquired** by VS when they are submitted by volunteers, board candidates, and donors. VS will also automatically mark referrals older than three months as **Expired**. Once you follow up on and start tracking a referral, you can change its status to **Active**, **Complete**, and **Not interested**.

To change the status of a referral:

1. Log in to your Agency account (see [Logging in to Your Agency Account](#) for instructions, if needed).
2. On your Agency's **myHome** page, find the **Referrals** tab and click it.
3. Find the referral(s) you would like to change the status of. If you have a large number of referrals, or if you would like to change the status of several referrals at once, you may need to sort the table by clicking the column heading you would like to sort by or filter it using the filter drop-down menus above the table.
4. Select the opportunity(ies) you would like to change the status of by clicking its/their check box(es) in the first column of the table.
5. Select a status setting from the **Change all checked referrals to** drop-down menu and click **Go**.

Note that you can also change the status of individual referrals by clicking the **Details** link on the right side of their entries in the table of referrals and then clicking the **change** link for the **Status** setting in the referral's **Referral Details** page.

# Downloading Referral Records

You can download referral records from VS for tracking and reporting purposes. You can **export** your Agency's referral records in several formats (including Microsoft Excel, **CSV**, and **HTML**), which is helpful if you would like to be able to manipulate the referral records in a spreadsheet or database.

To download referral records from your Agency account:

1. Log in to your Agency account (see [Logging in to Your Agency Account](#) for instructions, if needed).
2. On your Agency's **myHome** page, find the **Referrals** tab and click it.

3. If you wish to arrange referrals prior to downloading and/or select specific records to be downloaded, make adjustments and selections using the sorting and filtering tools provided (the clickable column names and the filtering drop-down menus).
4. If you would like to export the referral records (which allows for their manipulation in worksheets and databases), click the **Export records to CSV** link and follow the instructions for exporting the referrals in a download format you select.