Nonprofit Organization User Guide

UPVolunteer.org

This resource provided by
The Upper Peninsula Volunteer Network

U.P. Volunteer NETWORK

UPVolunteer.org:
Organizational Accounts

Creating an Organizational Account

Step 1: Go to UPvolunteer.org.

Step 2: Click on “Create Account” at the top right.

Step 3: Click on “Sign Up” in the Organizations box.

Step 4: Fill out the required information and click “Submit” at the bottom of the page.

Posting and Editing Events, Opportunities, and Activities

The difference between Opportunities, and Activities and Events:

Opportunities: Opportunities involve volunteer service and have service hours associated with them (i.e. mentoring). Volunteers may express interest in Opportunities through UPVolunteer.org.

Activities: Activities do not involve volunteer service and have no service hours associated with them, but still might interest volunteers (i.e. mentor training). Volunteers may express interest in Activities.

Events: Events take place over a specified amount of time such as a day, week or month and may include multiple Opportunities and/or Activities. (i.e. Mentoring Day.)

Posting Opportunities:

Step 1: Log into your account.

Step 2: Click on “Create a New Opportunity” at the top left.

Step 3: Fill in required information and click “Continue to Details” at the bottom.

Step 4: Fill in the details of your choosing.

Step 5: If you wish to associate the Opportunity with an Event, click on the “Related Event” drop box. Select the Event with which you wish to associate the

Opportunity. *The Event needs to be approved by your Volunteer Network or Volunteer Center administrator prior to associating Opportunities with it.

Step 6: Click “Continue to Dates and Times” at the bottom.

Step 7: Fill in required information and click on “Continue to Preview.”

Step 8: Preview the Opportunity and click “Save and Return to List” or “Save and Create Another.”

Editing Opportunities after Posting:

Step 1: Log into your account.

Step 2: Click on “Opportunities” in the left column.

Step 3: Find the desired Opportunity by searching.

Step 4: Once you find the Opportunity, click on the Opportunity name.

Step 5: Click “Edit” to the right of the Opportunity description.

Step 6: Make changes and resave as described in the Posting Opportunities section.

Posting Activities:

Step 1: Log into your account.

Step 2: Click on “Activities” in the left column.

Step 3: Click “New Activity” at the top right.

Step 4: Fill in required information and click “Continue to Details” at the bottom.

Step 5: Fill in the details of your choosing.

Step 6: If you wish to associate the Activity with an Event, click on the “Related Event” drop box. Select the Event with which you wish to associate the Activity. *The Event needs to be approved by your Volunteer Network or Volunteer Center administrator prior to associating Activities with it.

Step 7: Click “Continue to Dates and Times” at the bottom.

Step 8: Fill in required information and click on “Continue to Preview.”

Step 9: Preview the Activity and click “Save and Return to List” or “Save and Create Another.”

Editing Activities after Posting:

Step 1: Log into your account.

Step 2: Click on “Activities” in the left column.

Step 3: Find the desired Activity by searching.

Step 4: Once you find the Activity, click on the Activity name.

Step 5: Click “Edit” to the right of the Activity description.

Step 6: Make changes and resave as described in the Posting Activities section.

Posting Events:

Step 1: Log into your account.

Step 2: Click on “Create a New Event” at the top left.

Step 3: Fill in required information and <u>if</u> the event is an Emergency Response Event, click on “Continue to Emergency Options.” If it is not an Emergency Response Event, click “Skip to Preview.”

Step 4: Preview the Event and click “Save and Return to List.”

Editing Events after Posting:

Step 1: Log into your account.

Step 2: Click on “Events” in the left column.

Step 3: Find the desired Event by searching.

Step 4: Once you find the Event, click on the small edit icon to the right of the Event name.

Step 5: Make changes and resave as described in the Posting Events section.

<u>Managing Volunteers</u>

Adding a Volunteer to your organization:

Step 1: Log into your account.

Step 2: Click on “Create a New Volunteer” at the top left.

Step 3: Fill in required information and click “Save Profile” at the bottom. Remember you are creating a profile for the Volunteer to use; be sure to save the username and password information for them.

Editing a Volunteer Profile:

Step 1: Log into your account.

Step 2: Click on “Volunteers” in the left column.

Step 3: Find the desired Volunteer by searching.

Step 4: Once you find the Volunteer, click on the Volunteer username.

Step 5: Edit the Volunteer information and save.
*Volunteers may also log into their account to change their profile.

Adding Service Hours for a Volunteer:

Step 1: Log into your account.

Step 2: Click on “Volunteers” in the left column.

Step 3: Click on a volunteer’s name.

Step 4: Click “Record of Service” near the top right corner.

Step 5: Click “Create New Record.”

Step 6: Fill in the necessary information for your organization.

Viewing a Volunteer’s Service Hours:

Step 1: Log into your account.

Step 2: Click on “Volunteers” in the left column.

Step 3: Find the desired Volunteer by searching.

Step 4: Once you find the Volunteer, click on the Volunteer username.

Step 5: Click on “Record of Service” at the top.

When volunteers express interest:

You (as organization contact) will receive a system-generated email if a Volunteer expresses interested in an event, opportunity, or activity. The Volunteer may call or email the contact person provided on the website. Keep this information up-to-date for best results.

Accepting or Declining Volunteers for Opportunities or Activities:

Step 1: Click on “Opportunities” or “Activities.”

Step 2: Click on the manage referrals icon near the desired Opportunity or Activity.

Step 3: Select the appropriate tab describing the status of the Opportunity or Activity.

Step 4: Click on the edit icon to the right of the Volunteer you wish to accept or decline.

Step 5: Change the status of the Volunteer using the drop down box. A confirmation email will be sent to the Volunteer.