

Volunteer Self Service Portal App - Usage Document





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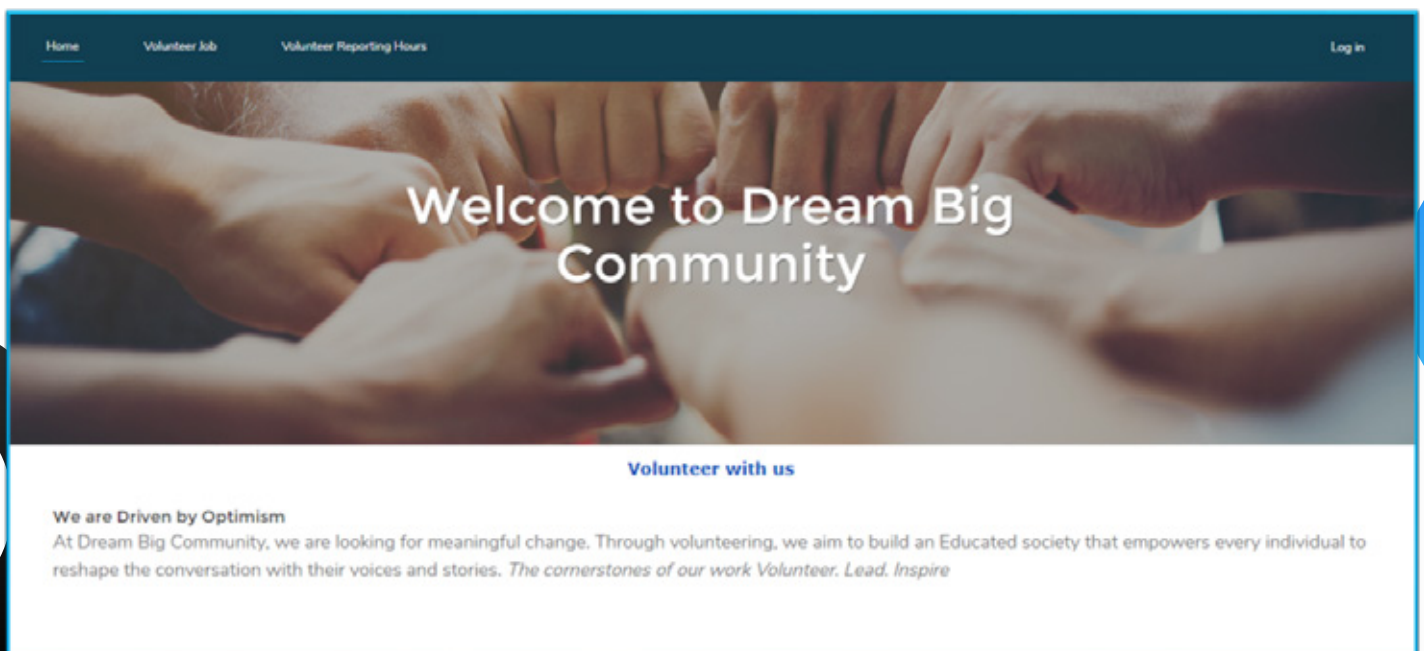
1. Purpose

The purpose of this document is to explain how volunteers can use DemandBlue's Volunteer self-service portal app to register, sign up for jobs, report their attendance and view personalized metrics.

2. Volunteer self-service portal walkthrough

2.1. Guest Volunteer

When guest users access the site URL, they will land on the home page of the portal as shown below



1. Register using “Volunteer with us” link: new volunteers can sign up through the "Volunteer with Us" link on the home page. When they click on the link, a signup form will be displayed as shown below.

HomeVolunteer JobVolunteer Reporting Hours

Log in

Salutation

--None--

* FirstName

* LastName

* Email

you@example.com

* Volunteer Skills

Computer usage

Manual labor

Marketing

Fundraising

Event Planning

* Volunteer Availability

Weekdays

Weekends

Morning

Afternoon

Weekly

Next

- Guest users shall fill in their details in the signup form as shown below and click 'Next'

HomeVolunteer JobVolunteer Reporting Hours

Log in

Salutation

Mr.

* FirstName

Will

* LastName

Smith

* Email

Smith@

* Volunteer Skills

Computer usage

Manual labor

Marketing

Fundraising

Event Planning

* Volunteer Availability

Weekdays

Weekends

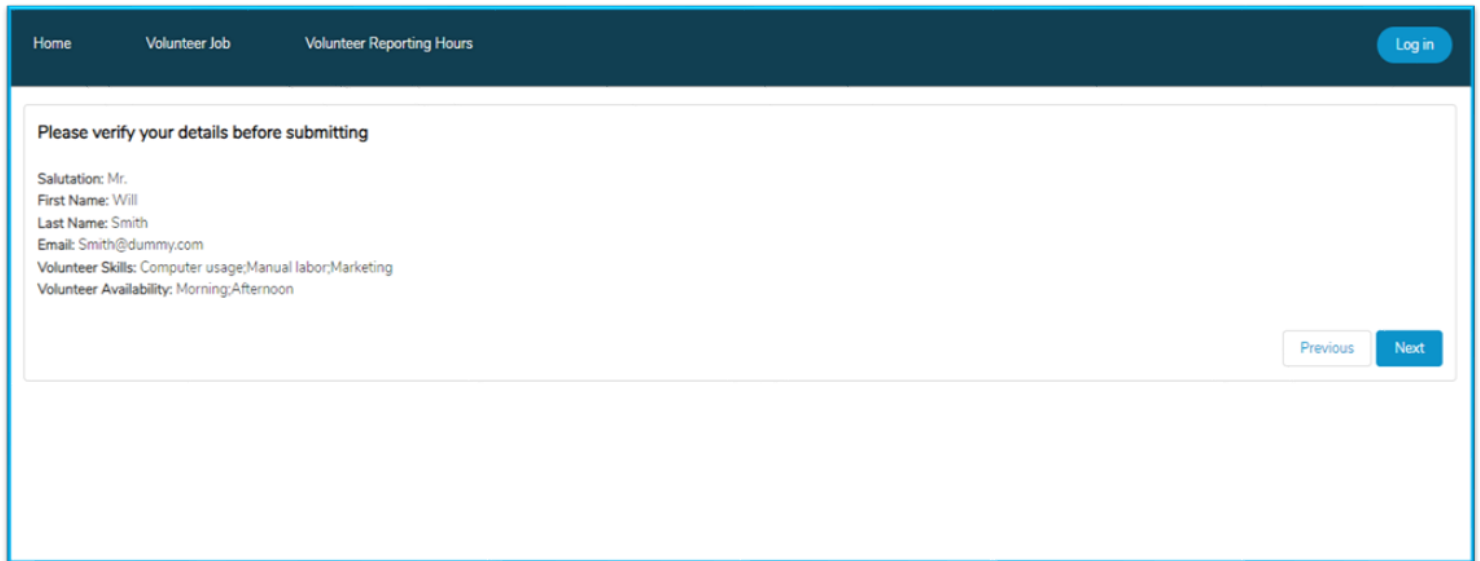
Morning

Afternoon

Weekly

Next

- On the next screen, the summary will be displayed with the details entered on the previous screen. Click 'Next'.



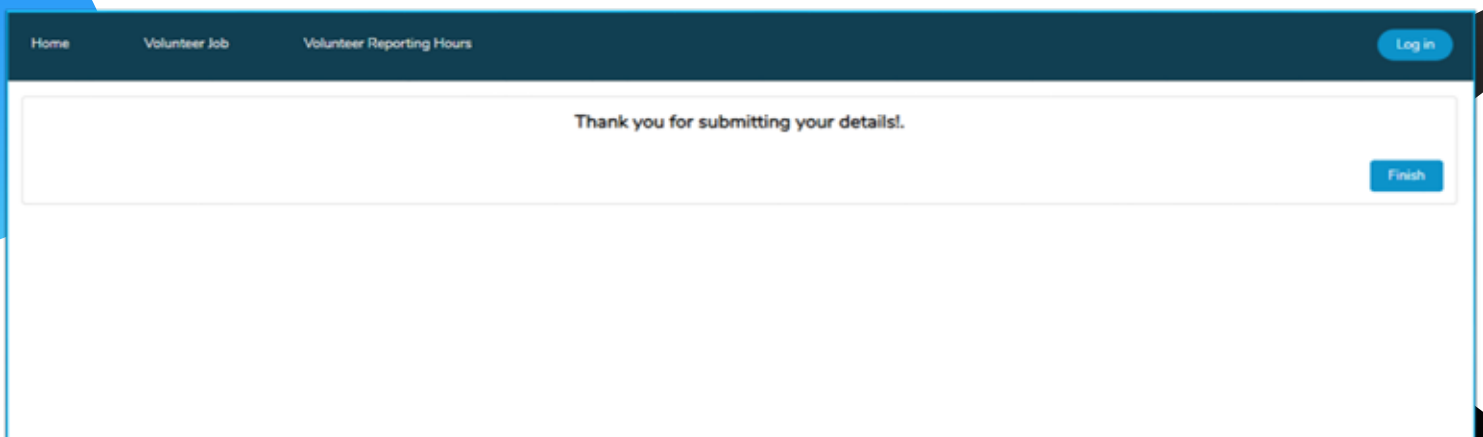
Home Volunteer Job Volunteer Reporting Hours Log in

Please verify your details before submitting

Salutation: Mr.
First Name: Will
Last Name: Smith
Email: Smith@dummy.com
Volunteer Skills: Computer usage;Manual labor;Marketing
Volunteer Availability: Morning;Afternoon

Previous Next

- On the next screen, a 'Thank You' message will be displayed.



Home Volunteer Job Volunteer Reporting Hours Log in

Thank you for submitting your details!

Finish

- A contact record will be created in Salesforce based on the details entered in the signup form

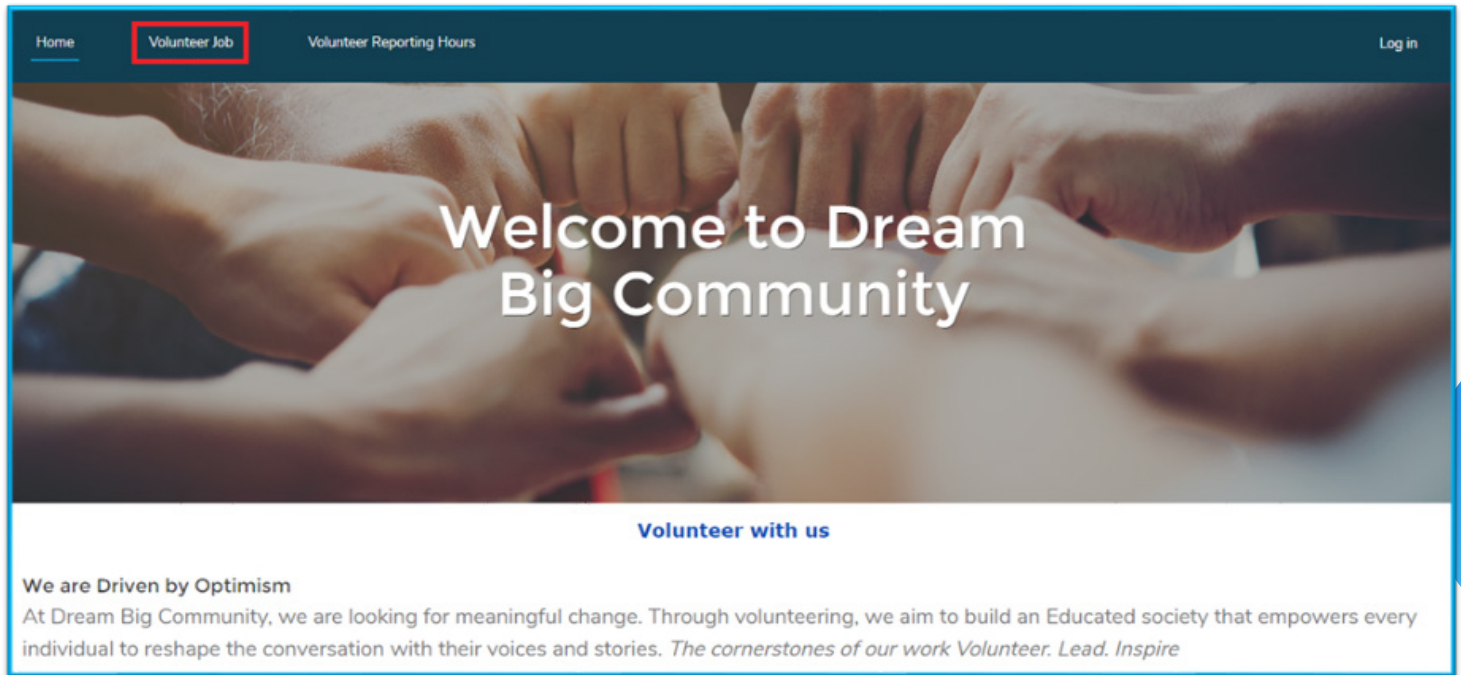
The screenshot shows a Salesforce contact record for 'Mr. Will Smith'. The interface includes a top navigation bar with various tabs like Home, Volunteers Help, and Contacts. The main content area is divided into several sections:

- Contact Details:** Includes fields for Name (Mr. Will Smith), Birthdate, Account Name, Title, and Description. The Name field is highlighted with a red box.
- Contact Information:** Includes fields for Home Phone, Mobile, Other Phone, and Email (smith@...). The Email field is highlighted with a red box.
- Volunteer Information:** Includes fields for Volunteer Status, New Sign Up, Volunteer Hours, First Volunteer Date, Last Volunteer Date, Volunteer Organization, Volunteer Last Web Signup Date, Volunteer Skills (Computer usage:Manual labor:Marketing), Volunteer Availability (Morning:Afternoon), Volunteer Notes, and Volunteer Manager Notes. The Volunteer Skills and Availability fields are highlighted with a red box.
- System Information:** Includes fields for Created By, Last Modified By, Contact Owner, and Lead Source.

On the right side, there is an 'Activity' section showing a task titled 'Volunteer Signup Thank ...' with a description: 'An automatic thank you email has been sent to the contact for signing up to be a volunteer.'

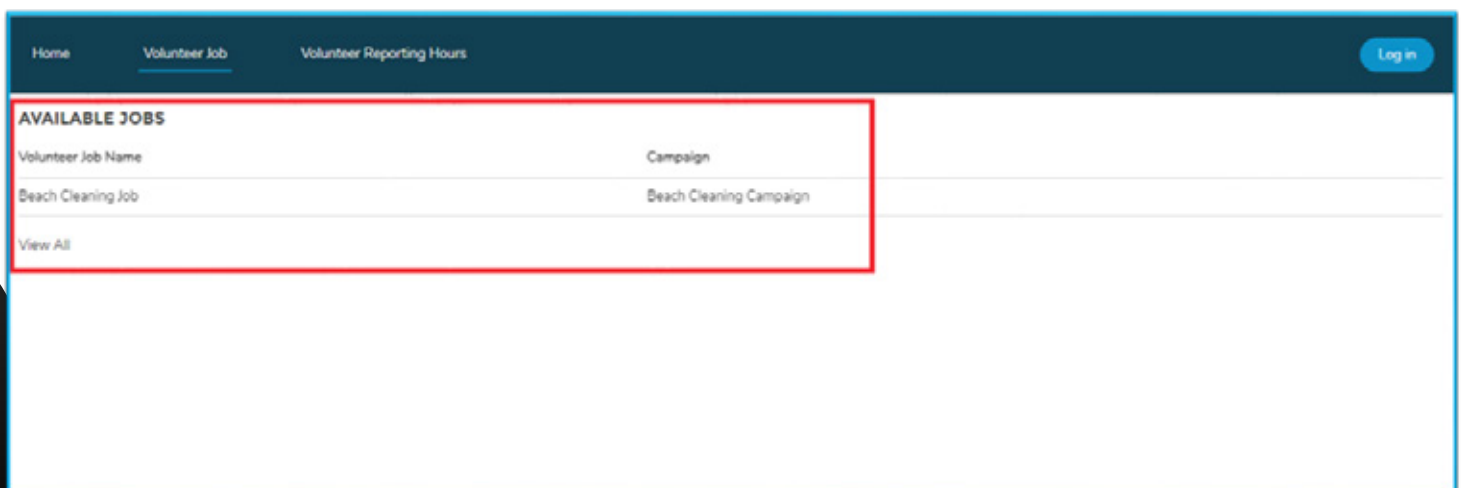
2. Sign up for a Volunteer Job:

- Volunteers can navigate to the **volunteer job** tab.



- They can click on any available volunteer job.

Note: The admin needs to create Volunteer Jobs and Shifts in their organization.



- On this page, the volunteer job details, and related shift details will be displayed. Volunteers shall click on the "**Sign up for Volunteer Job**" button.

HomeVolunteer JobVolunteer Reporting Hours

Log in

Volunteer Job

Beach Cleaning Job

Volunteer Job Name

Beach Cleaning Job

Description

Location

Location Street

North Street

Location State/Province

Columbia

Campaign

Beach Cleaning Campaign

Location City

Columbia

Location Zip/Postal Code

621007

Upcoming Volunteer Shifts (41)

Shift ID	Start Date	Duration	Job Location City
Shift-00005	3/17/2023, 7:00 PM	2	Columbia
Shift-00006	3/18/2023, 7:00 PM	2	Columbia
Shift-00007	3/19/2023, 7:00 PM	2	Columbia
Shift-00008	3/20/2023, 7:00 PM	2	Columbia

View All

- The Volunteer Job signup form will be displayed. Volunteers can fill in the volunteer details and click on 'Next'.

HomeVolunteer JobVolunteer Reporting Hours

Log in

Volunteer Job

Beach Cleaning Job

Volunteer Job Name

Beach Cleaning Job

Description

Location

Location Street

North Street

Location State/Province

Columbia

Campaign

Beach Cleaning Campaign

Location City

Columbia

Location Zip/Postal Code

621007

Upcoming Volunteer Shifts (41)

Shift ID	Start Date	Duration	Job Location City
Shift-00005	3/17/2023, 7:00 PM	2	Columbia
Shift-00006	3/18/2023, 7:00 PM	2	Columbia
Shift-00007	3/19/2023, 7:00 PM	2	Columbia
Shift-00008	3/20/2023, 7:00 PM	2	Columbia

View All

Sign up for Volunteer Job

Salutation

Mr.

First Name

Tim

Last Name

David

Email

david@dummy.com

Volunteer Skills

Computer usage

Manual labor

Marketing

Fundraising

Event Planning

Volunteer Availability

Weekdays

Weekends

Morning

Next

- Volunteers can select the available shift to sign up for, and then click on 'Next'.

Sign up for Volunteer Job

Please select your shift

3/17/2023, 7:00 PM

Previous Next

Shift ID	Start Date	Duration	Job Location City
Shift-00005	3/17/2023, 7:00 PM	2	Columbia
Shift-00006	3/18/2023, 7:00 PM	2	Columbia
Shift-00007	3/19/2023, 7:00 PM	2	Columbia
Shift-00008	3/20/2023, 7:00 PM	2	Columbia

- On the next screen, the Summary screen will be displayed. Click on 'Next'.

Sign up for Volunteer Job

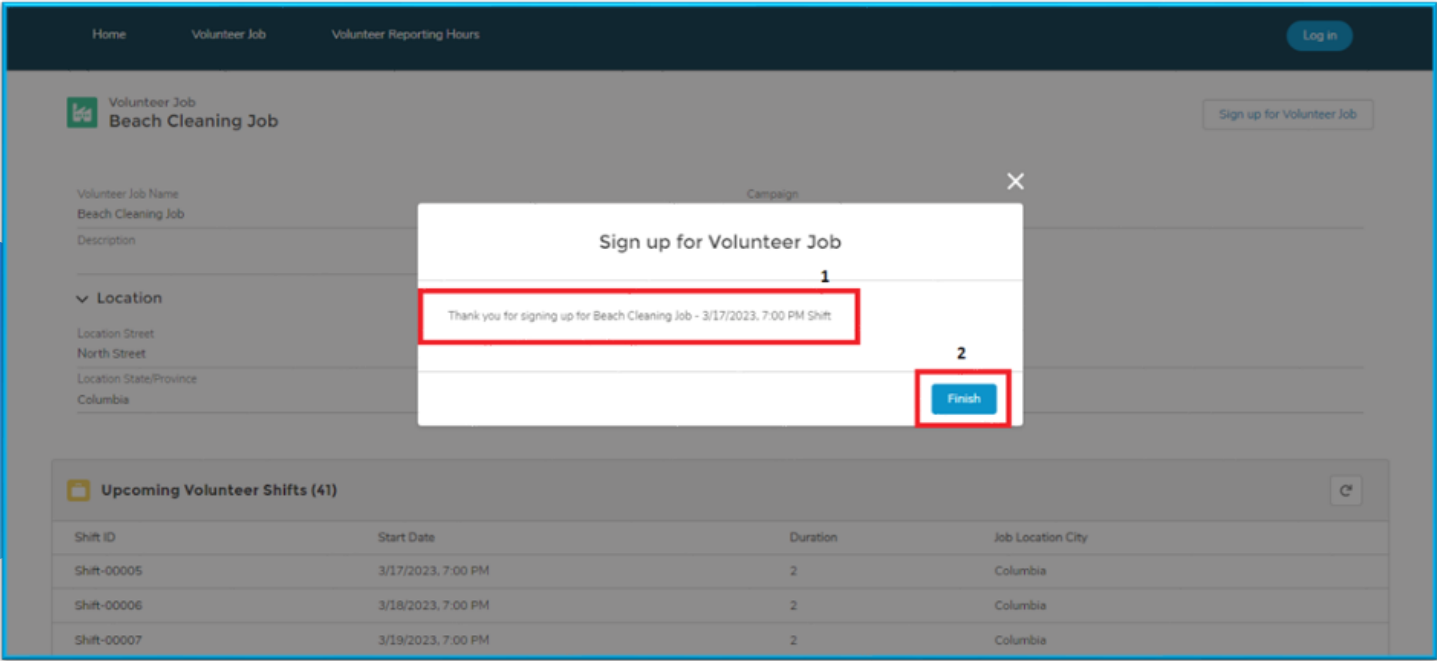
Please verify your details before submitting

Salutation: Mr.
First Name: Tim
Last Name: David
Email: david@dummys.com
Volunteer Skills: Computer usage;Manual labor;Marketing
Volunteer Availability: Weekdays;Weekends;Morning
Shift Start Date & Time: 3/17/2023, 7:00 PM

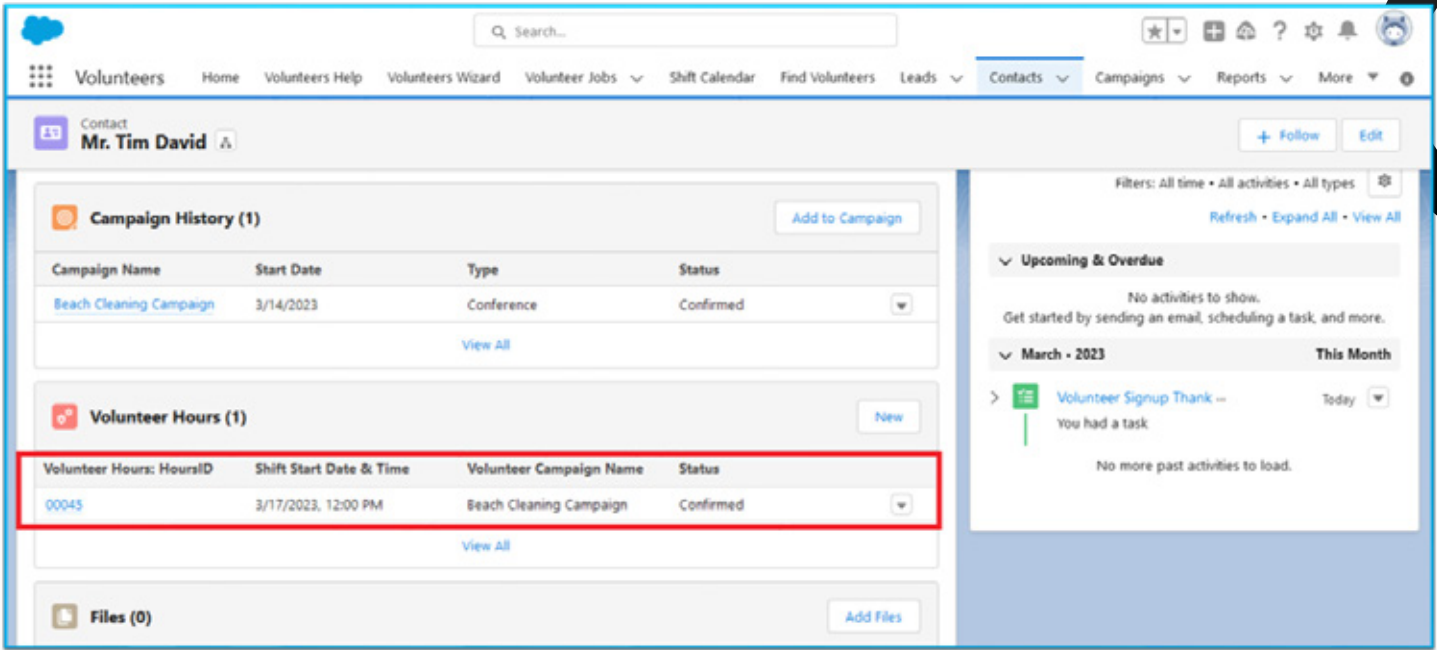
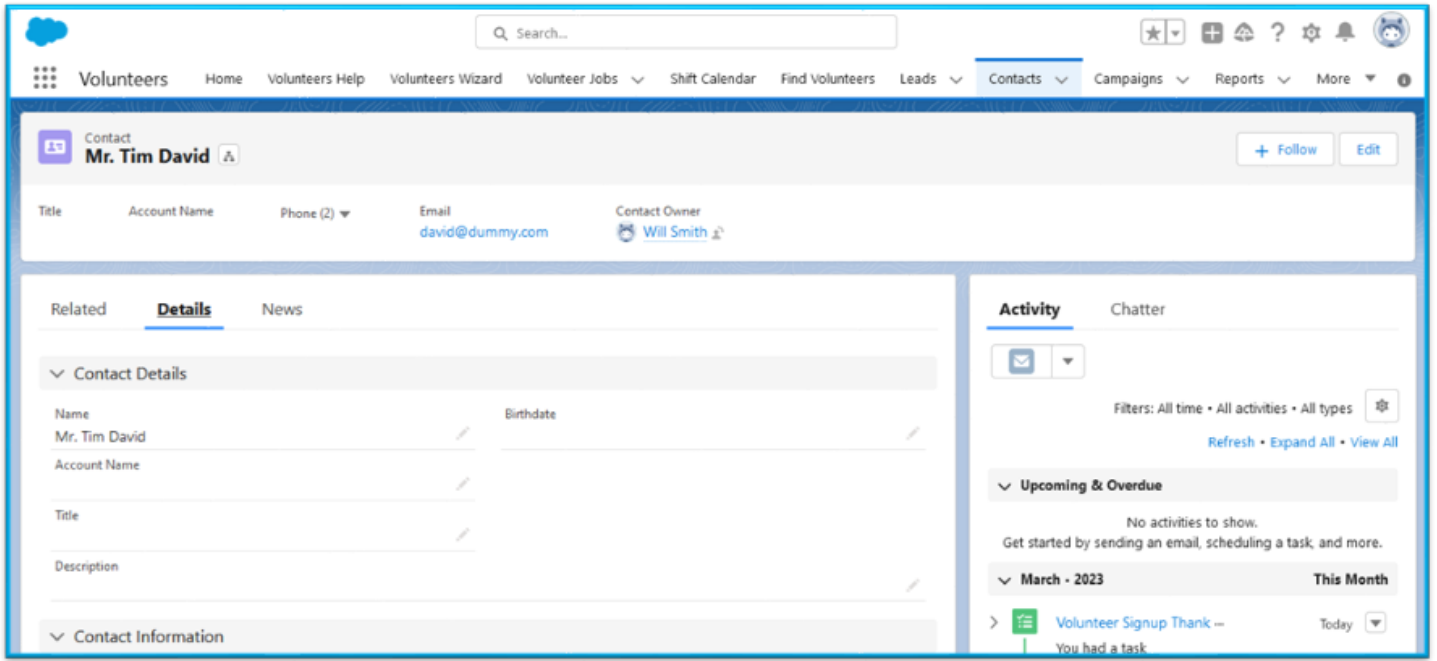
Previous Next

Shift ID	Start Date	Duration	Job Location City
Shift-00005	3/17/2023, 7:00 PM	2	Columbia
Shift-00006	3/18/2023, 7:00 PM	2	Columbia
Shift-00007	3/19/2023, 7:00 PM	2	Columbia

- On the next screen, a "Thank you" message will be displayed. Click on 'Finish'.



- After submitting the volunteer Job signup form, a Volunteer Contact and Volunteer Hour record will be created in Salesforce.



3. Sign up for a Volunteer Shift

Volunteers also have the option to sign up against a specific shift based on their availability.

- Select a shift from the volunteer job page.

Home Volunteer Job Volunteer Reporting Hours Log in

Volunteer Job
Beach Cleaning Job Sign up for Volunteer Job

Volunteer Job Name: Beach Cleaning Job
Description:
Campaign: Beach Cleaning Campaign

Location
Location Street: North Street
Location City: Columbia
Location State/Province: Columbia
Location Zip/Postal Code: 621007

Upcoming Volunteer Shifts (41)

Shift ID	Start Date	Duration	Job Location City
Shift-00005	3/17/2023, 7:00 PM	2	Columbia
Shift-00006	3/18/2023, 7:00 PM	2	Columbia
Shift-00007	3/19/2023, 7:00 PM	2	Columbia
Shift-00008	3/20/2023, 7:00 PM	2	Columbia

View All

- Click on the 'Signup for Volunteer Shift' button.

Home Volunteer Job Volunteer Reporting Hours Log in

Volunteer Shift
Shift-00006 Sign up for Volunteer Shift

Shift ID: Shift-00006
Start Date & Time: 3/18/2023, 7:00 PM
Volunteer Job: Beach Cleaning Job
Duration (Hours): 2:00
Description:

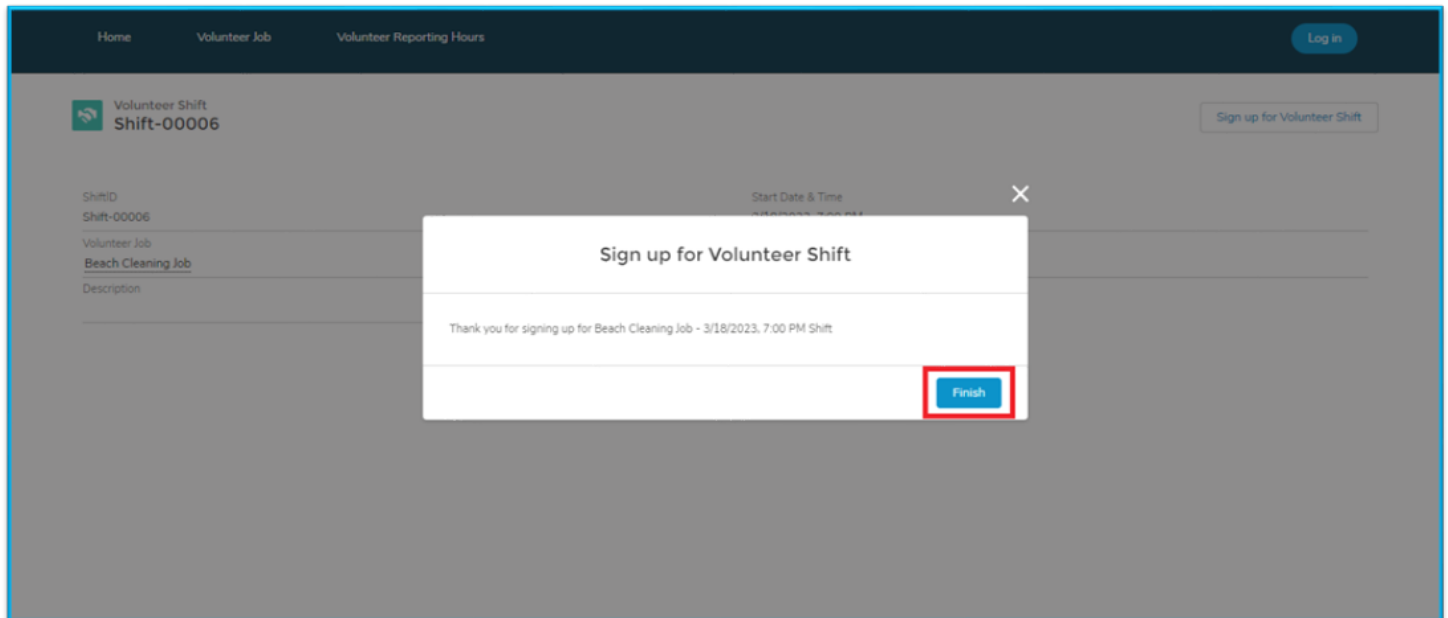
- The Volunteer Shift signup form will open. Volunteer can fill in the details and click 'Next'.

The screenshot shows a web application interface with a dark blue header containing 'Home', 'Volunteer Job', and 'Volunteer Reporting Hours' links, and a 'Log in' button. The main content area is grey and displays 'Volunteer Shift Shift-00006' with a green icon, 'Shift-00006', 'Volunteer Job Beach Cleaning Job', and a 'Description' field. A white modal form titled 'Sign up for Volunteer Shift' is open in the center. The form contains the following fields: 'Salutation' (dropdown menu), 'First Name' (text input with 'Jack'), 'Last Name' (text input with 'Sparrow'), 'Email' (text input with 'sparrow@dummy.com'), 'Volunteer Skills' (checkboxes for 'Computer usage', 'Manual labor', 'Marketing', 'Fundraising', and 'Event Planning'), and 'Volunteer Availability' (checkboxes for 'Weekdays', 'Weekends', 'Morning', 'Afternoon', and 'Weekly'). A blue 'Next' button is at the bottom right of the form.

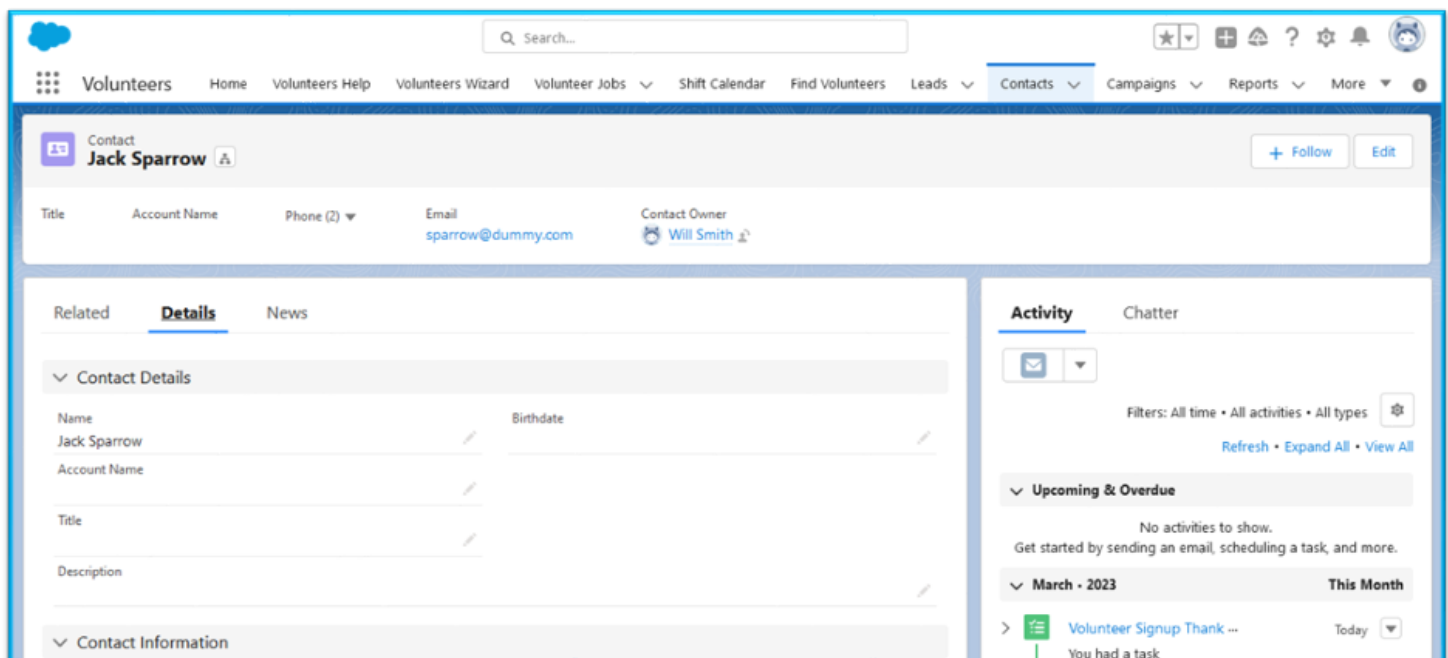
- On the next screen, the Summary screen will be displayed. Click on 'Next'.

The screenshot shows the same web application interface as the previous one. The modal form is now a summary screen titled 'Sign up for Volunteer Shift'. It contains the text 'Please verify your details before submitting' followed by a list of details: 'Salutation:', 'First Name: Jack', 'Last Name: Sparrow', 'Email: sparrow@dummy.com', 'Volunteer Skills: Computer usage;Manual labor;Fundraising', 'Volunteer Availability: Weekdays;Weekends;Morning', 'Job Name: Beach Cleaning Job', and 'Shift Start Date & Time: 3/18/2023, 7:00 PM'. At the bottom right of the form, there are two buttons: 'Previous' and 'Next'. The 'Next' button is highlighted with a red rectangular border.

- On the next screen, a "Thank you" message will be displayed. Click on 'Finish'



- After submitting the volunteer Shift signup form, a Volunteer Contact and Volunteer Hour record will be created in Salesforce.



Contact

Jack Sparrow

Campaign History (1)

Campaign Name

Start Date

Type

Status

Beach Cleaning Campaign

3/14/2023

Conference

Confirmed

Add to Campaign

View All

Volunteer Hours (1)

Volunteer Hours: HoursID

Shift Start Date & Time

Volunteer Campaign Name

Status

00046

3/18/2023, 12:00 PM

Beach Cleaning Campaign

Confirmed

New

View All

Files (0)

Add Files

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

March • 2023

This Month

Volunteer Signup Thank --

You had a task

Today

No more past activities to load.

4. Submit the Volunteer Reporting Hours (attendance)

Volunteers can use the “Volunteer Reporting Hours” tab to specify the number of hours they contributed for a volunteering activity.

- Click on the “Volunteer Reporting Hours” tab.

Home Volunteer Job Volunteer Reporting Hours Log in

Welcome to Dream Big Community

Volunteer with us

We are Driven by Optimism

At Dream Big Community, we are looking for meaningful change. Through volunteering, we aim to build an Educated society that empowers every individual to reshape the conversation with their voices and stories. *The cornerstones of our work Volunteer. Lead. Inspire*

- The Volunteer Reporting Hour form will be displayed. Enter the existing Volunteer contact details and click 'Next'.

Home Volunteer Job Volunteer Reporting Hours Log in

Firstname

Tim

LastName

David

Email

devid@dummy.com

Volunteer Job

Beach Cleaning Job

Next

demandblue

15

- On the next screen, volunteers shall select the shift details, enter hours worked and comments. Click on 'Next'.

- On the next screen, the Summary screen will be displayed to validate the details entered. Click on 'Next'.

- On the next screen, a 'Thank you' message will be displayed. Click on 'Finish'.

- Volunteer attendance details will be captured in Salesforce. In Salesforce, Tim David's volunteer hour status will be changed from confirmed to completed as shown below.

Volunteers Home Volunteers Help Volunteers Wizard Volunteer Jobs Shift Calendar Find Volunteers Leads Contacts Campaigns Reports More

Contact **Mr. Tim David**

+ Follow Edit

Campaign History (1)

Add to Campaign

Campaign Name	Start Date	Type	Status
Beach Cleaning Campaign	3/14/2023	Conference	Completed

[View All](#)

Volunteer Hours (1)

New

Volunteer Hours: HoursID	Shift Start Date & Time	Volunteer Campaign Name	Status
00045	3/17/2023, 12:00 PM	Beach Cleaning Campaign	Completed

[View All](#)

Files (0) Add Files

Filters: All time • All activities • All types
Refresh Expand All View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

March - 2023 This Month

- > Volunteer Signup Thank — Today You had a task

No more past activities to load.

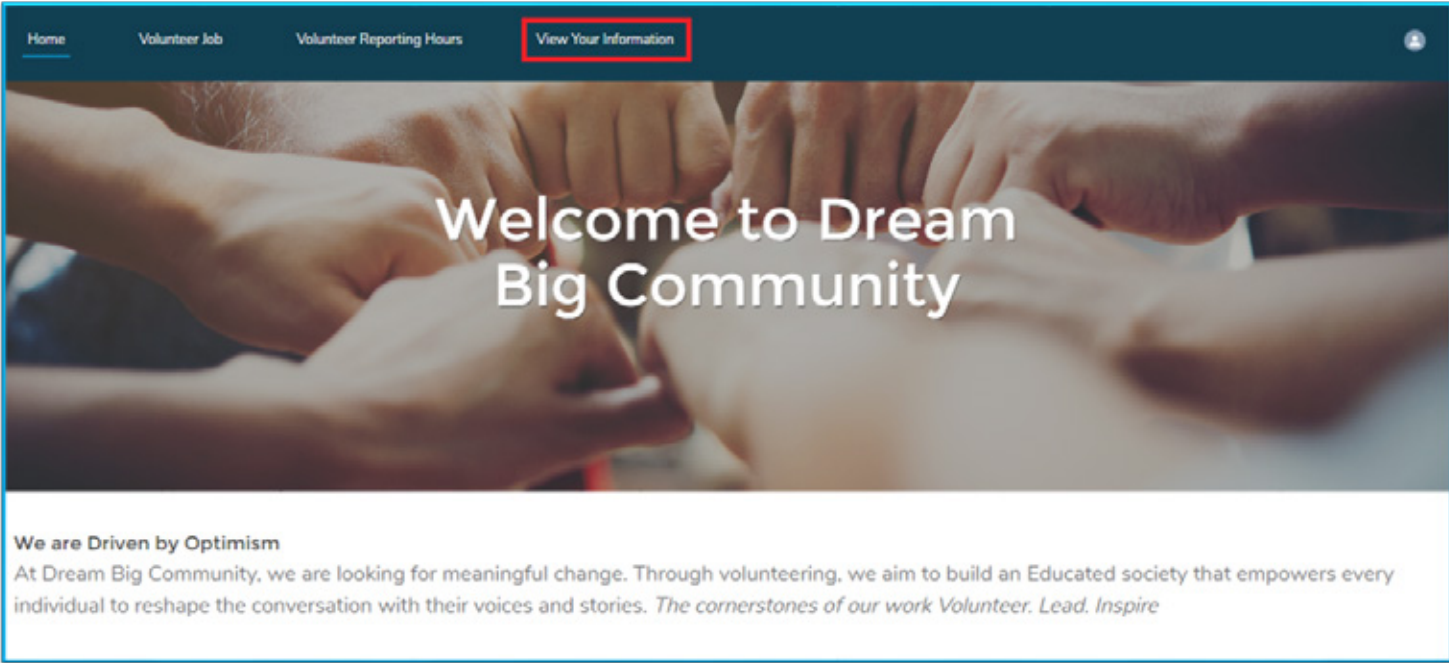
2.2. Logged in Volunteer

For logged-in volunteers, the portal will have the same tabs as guest volunteers. In addition, they see a tab called 'View Your Information' which will display personalized information as explained below.

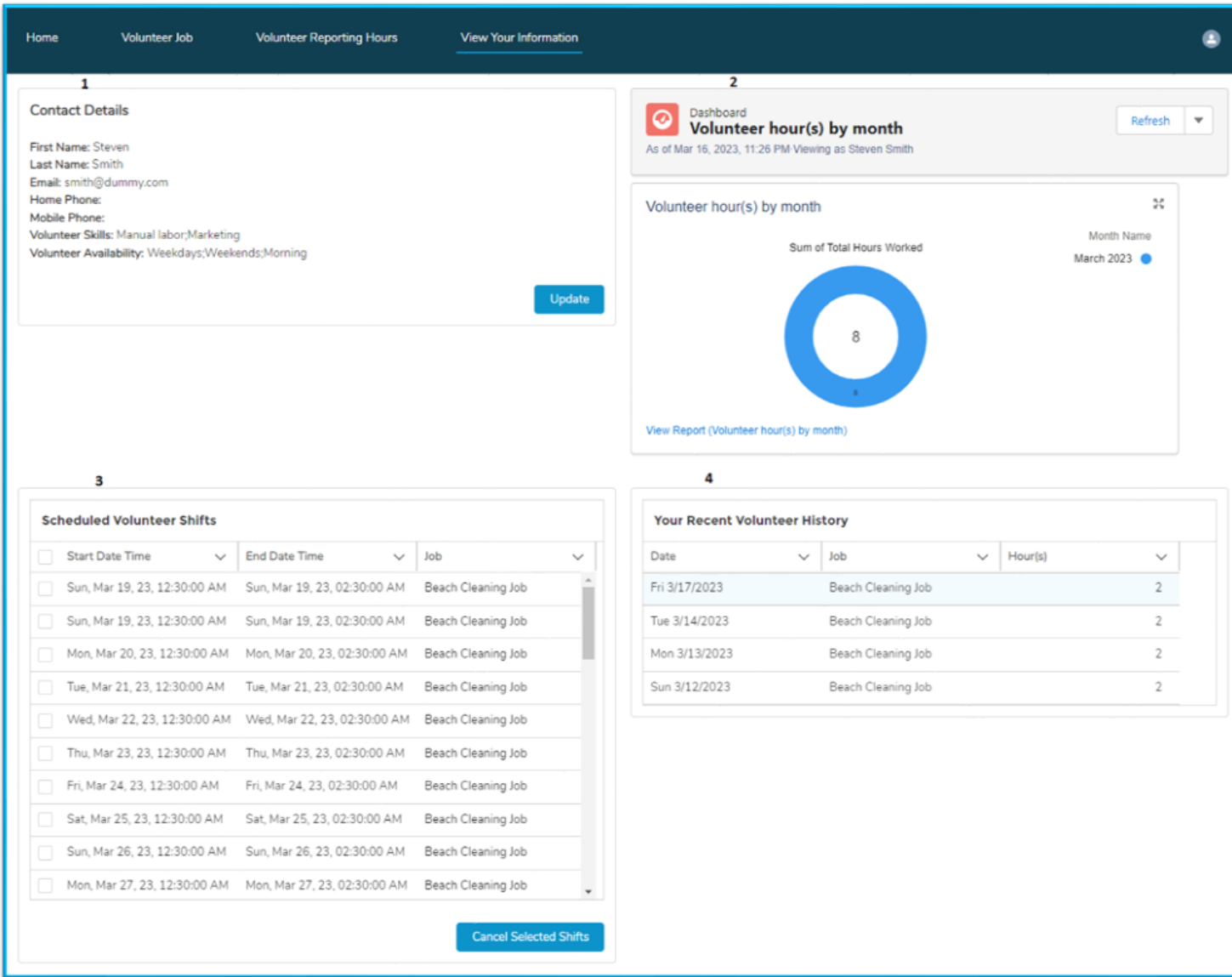
Note: For logged in volunteers, all the forms will be pre-populated with volunteer details unlike guest volunteers.

Below image shows the Portal view for logged in volunteers

- Volunteer shall click on the “View Your Information” tab.



- The "View Your Information" tab provides the following information.
 1. Contact Details
 2. Volunteer hour(s) by month
 3. Scheduled Volunteer Shifts
 4. Your Recent Volunteer History



1. Contact details:

- Volunteers can use this section to update their contact details as shown below by clicking on the “Update” button.

Contact Details

First Name: Steven

Last Name: Smith

Email: smith@dummy.com

Home Phone:

Mobile Phone:

Volunteer Skills: Manual labor;Marketing

Volunteer Availability: Weekdays;Weekends;Morning

Update

Name

Steven Smith

Email

smith@dummy.com

1

Home Phone

1234567890

Mobile Phone

Volunteer Skill

Computer usage

Manual labor

Marketing

Fundraising

Event Planning

Volunteer Availability

Weekdays

Weekends

Morning

Afternoon

Weekly

2

Cancel

Update

- Details will be updated in the volunteer contact. In this case, “Home Phone” has been updated successfully in Salesforce as shown below.

Contact Details

First Name: Steven

Last Name: Smith

Email: smith@dummy.com

Home Phone: 1234567890

Mobile Phone:

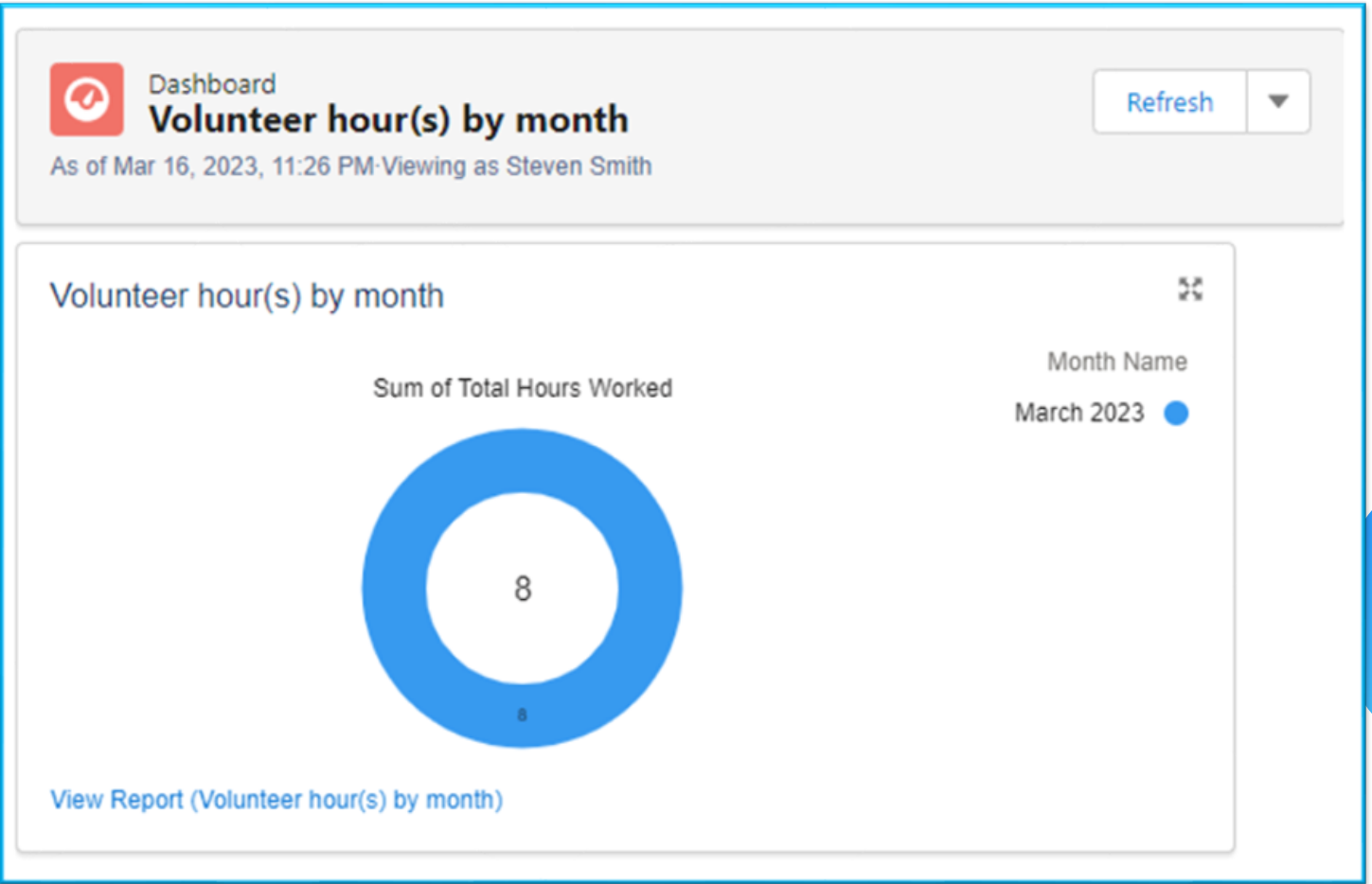
Volunteer Skills: Manual labor;Marketing

Volunteer Availability: Weekdays;Weekends;Morning

Update

2. Volunteers hour(s) by month:

- This section will display the completed volunteer hours by month for the logged-in volunteer.



3. Scheduled Volunteer Shifts:

- This table displays the upcoming volunteer shifts for the logged-in volunteer.

Scheduled Volunteer Shifts

☐	Start Date Time	End Date Time	Job
☐	Sun, Mar 19, 23, 12:30:00 AM	Sun, Mar 19, 23, 02:30:00 AM	Beach Cleaning Job
☐	Sun, Mar 19, 23, 12:30:00 AM	Sun, Mar 19, 23, 02:30:00 AM	Beach Cleaning Job
☐	Mon, Mar 20, 23, 12:30:00 AM	Mon, Mar 20, 23, 02:30:00 AM	Beach Cleaning Job
☐	Tue, Mar 21, 23, 12:30:00 AM	Tue, Mar 21, 23, 02:30:00 AM	Beach Cleaning Job
☐	Wed, Mar 22, 23, 12:30:00 AM	Wed, Mar 22, 23, 02:30:00 AM	Beach Cleaning Job
☐	Thu, Mar 23, 23, 12:30:00 AM	Thu, Mar 23, 23, 02:30:00 AM	Beach Cleaning Job
☐	Fri, Mar 24, 23, 12:30:00 AM	Fri, Mar 24, 23, 02:30:00 AM	Beach Cleaning Job
☐	Sat, Mar 25, 23, 12:30:00 AM	Sat, Mar 25, 23, 02:30:00 AM	Beach Cleaning Job
☐	Sun, Mar 26, 23, 12:30:00 AM	Sun, Mar 26, 23, 02:30:00 AM	Beach Cleaning Job
☐	Mon, Mar 27, 23, 12:30:00 AM	Mon, Mar 27, 23, 02:30:00 AM	Beach Cleaning Job

Cancel Selected Shifts

- Volunteers can select multiple shifts from the table and click on 'Cancel Selected Shifts'.

Scheduled Volunteer Shifts

☐	Start Date Time	End Date Time	Job
☐	Sun, Mar 19, 23, 12:30:00 AM	Sun, Mar 19, 23, 02:30:00 AM	Beach Cleaning Job
☒	Sun, Mar 19, 23, 12:30:00 AM	Sun, Mar 19, 23, 02:30:00 AM	Beach Cleaning Job
☒	Mon, Mar 20, 23, 12:30:00 AM	Mon, Mar 20, 23, 02:30:00 AM	Beach Cleaning Job
☒	Tue, Mar 21, 23, 12:30:00 AM	Tue, Mar 21, 23, 02:30:00 AM	Beach Cleaning Job
☐	Wed, Mar 22, 23, 12:30:00 AM	Wed, Mar 22, 23, 02:30:00 AM	Beach Cleaning Job
☐	Thu, Mar 23, 23, 12:30:00 AM	Thu, Mar 23, 23, 02:30:00 AM	Beach Cleaning Job
☐	Fri, Mar 24, 23, 12:30:00 AM	Fri, Mar 24, 23, 02:30:00 AM	Beach Cleaning Job
☐	Sat, Mar 25, 23, 12:30:00 AM	Sat, Mar 25, 23, 02:30:00 AM	Beach Cleaning Job
☐	Sun, Mar 26, 23, 12:30:00 AM	Sun, Mar 26, 23, 02:30:00 AM	Beach Cleaning Job
☐	Mon, Mar 27, 23, 12:30:00 AM	Mon, Mar 27, 23, 02:30:00 AM	Beach Cleaning Job

1

2

Cancel Selected Shifts

- A warning screen will be displayed with the selected shifts. Volunteers can click on the 'Yes, Cancel' button to cancel the selected shifts.

Are you sure you want to cancel the selected shifts?

Start Date Time	Job
Sun, Mar 19, 23, 12:30:00 AM	Beach Cleaning Job
Mon, Mar 20, 23, 12:30:00 AM	Beach Cleaning Job
Tue, Mar 21, 23, 12:30:00 AM	Beach Cleaning Job

BackYes, Cancel

- Canceled shifts will be removed from the table and Status will be changed to “Cancelled” in Salesforce.

Scheduled Volunteer Shifts

☐	Start Date Time	End Date Time	Job
☐	Sun, Mar 19, 23, 12:30:00 AM	Sun, Mar 19, 23, 02:30:00 AM	Beach Cleaning Job
☐	Wed, Mar 22, 23, 12:30:00 AM	Wed, Mar 22, 23, 02:30:00 AM	Beach Cleaning Job
☐	Thu, Mar 23, 23, 12:30:00 AM	Thu, Mar 23, 23, 02:30:00 AM	Beach Cleaning Job
☐	Fri, Mar 24, 23, 12:30:00 AM	Fri, Mar 24, 23, 02:30:00 AM	Beach Cleaning Job
☐	Sat, Mar 25, 23, 12:30:00 AM	Sat, Mar 25, 23, 02:30:00 AM	Beach Cleaning Job
☐	Sun, Mar 26, 23, 12:30:00 AM	Sun, Mar 26, 23, 02:30:00 AM	Beach Cleaning Job
☐	Mon, Mar 27, 23, 12:30:00 AM	Mon, Mar 27, 23, 02:30:00 AM	Beach Cleaning Job
☐	Tue, Mar 28, 23, 12:30:00 AM	Tue, Mar 28, 23, 02:30:00 AM	Beach Cleaning Job
☐	Wed, Mar 29, 23, 12:30:00 AM	Wed, Mar 29, 23, 02:30:00 AM	Beach Cleaning Job
☐	Thu, Mar 30, 23, 12:30:00 AM	Thu, Mar 30, 23, 02:30:00 AM	Beach Cleaning Job

Cancel Selected Shifts

4. Your Recent Volunteer History:

- This table will display the volunteering history for the logged-in Volunteer.

Your Recent Volunteer History		
Date	Job	Hour(s)
Fri 3/17/2023	Beach Cleaning Job	2
Tue 3/14/2023	Beach Cleaning Job	2
Mon 3/13/2023	Beach Cleaning Job	2
Sun 3/12/2023	Beach Cleaning Job	2



THANK YOU.

CONTACT

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Email : info@demandblue.com

Website : www.demandblue.com

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