



## Scheduling and Closing Shifts

The Events tool in SmartVAN is a versatile and extremely useful way to organize who need to call to remind them to attend our events, to track how active our volunteer base is, and to build our list of active volunteers moving forward.

### Scheduling People into an Event in SmartVAN:

#### Inside Grid View:

Click the calendar icon in the correct row, which will bring up a new window to schedule the person into an event. The events scheduler includes a calendar where you can select one or multiple days. This then populates the right-side of the scheduler with every event occurring on those dates, as well as the shifts, locations, and roles associated with them. You can select multiple dates by using the shift key on your keyboard.

Event Signup Scheduler - David Adams

Use Ctrl or Shift key to select multiple dates

Dates Selected: 1

January 2014

S	M	T	W	T	F	S
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Event Type

Event Name

Roles

Location

Within

☐ Only Shifts at Staging Locations

Refresh

Type	Event	Date	Time	Location	Role	Status
■	Tampa Bay Chapter Meeting	Sat 1/18	9:00 AM - 1:00 PM		Host	<input type="text"/>
■	Tampa Bay Chapter Meeting	Sat 1/18	9:00 AM - 1:00 PM		Attendee	<input type="text"/>
■	JAX- N FL Training	Sat 1/18	1:00 PM - 5:00 PM		Host	<input type="text"/>
■	JAX- N FL Training	Sat 1/18	1:00 PM - 5:00 PM		Attendee	Scheduled <input type="text"/>

You may restrict the events shown in the list to those matching a specified name, or within a specified radius of a ZIP code. Once you have located the appropriate shift, use the dropdown and mark the person Scheduled if they are coming to the event (or Declined if they said no).



Through Quick Mark:

From the main menu, click on Quick Mark, and choose Schedule for an Event. Select the date of the event and enter its name, then proceed to pick a shift (if multiple), the role, and the event status (usually Scheduled, or Completed if after the event) you want to apply for each volunteer. Note that you should choose to "Add Contact History" so we can track when people are reached out to and by whom and properly show the person had a conversation with us.



An example of the setup screen is shown on the following page:

A screenshot of the "Schedule People for Event" form. The form has a title "Schedule People for Event" and a subtitle "Select the data you wish to apply". It contains several fields: "Date" (6/1/2013), "Event" (State Convention), "Time" (8:30 AM - 6:00 PM), "Location" (This event has no locations associated with it), "Role" (Attendee), "Status" (Scheduled), "Add Contact History" (checked), "Canvasser" (Last Name, First Name, PA, Add New), "When" (6/19/13), and "Contacted How" (Phone). A "Finish" button is at the bottom right.

Once you have selected the data you wish to apply to each person, click Finish. You will be taken to a Quick Look Up screen. When you find the correct person, click the checkbox next to their name. By clicking "Save/Search", you will save the record you have just modified, and then search for the next person that you enter into Quick Look Up

From a Person's Profile (via Quick Look Up) or from a VPB:

Last but not least, you may also schedule people for events directly from a VPB or from their profile page. In the profile, this can be done under either the Past Events or Future events section (no difference scheduling), and in a VPB from the event scheduler button in the upper right. This will operate the same way as using the scheduler from Grid View.



### **Closing Event Shifts:**

This process is identical to those listed before – in the case of people who are scheduled for an event, follow the Confirmation call process and use Completed instead of Confirmed and No Show instead of Declined/Cancelled (only those still marked as Scheduled/Confirmed). Quick Actions is especially useful for closing shifts from a sign-in sheet, first marking all attendees completed, then leftover scheduled/confirmed as No Show. For people not already scheduled for the event who did show up, use Quick Mark and use Completed rather than Scheduled.