Create a Volunteer Opportunity (Date and Time Specific)

Volunteer Opportunities are always created using the Volunteer Opportunity Wizard.

- In SF classic the wizard is accessed through the Create Volunteer Opportunity link in the "Create Volunteer Opportunity" widget on the left sidebar of the page.
- In SF lightning you'll find the wizard in the utility bar at the bottom left of each page.
- Clicking on "New" in a volunteer opportunity record will also launch the wizard.

In this step-by-step flow, you'll be able to create all required elements of a volunteer opportunity, as well as one or more occurrences (dates / times / location) that the opportunity takes place.

**NOTE:** The flow for creating volunteer opportunities can be customized to include additional fields of information, so your version may have more or fewer or more fields than in the documentation below. Contact HandsOn Connect support for pricing information if you wish to have your flow customized in any way.

**NOTE:** The steps for creating a volunteer opportunity are the same whether you are in Salesforce Classic or Salesforce Lightning. Some of the screenshots below are from the classic version of the wizard, and some are from lightning. The contents will be the same in both environments.

Click on the Create Volunteer Opportunity Link (SF Classic)

Clicking on this link will open a 'flow' that will take you step-by-step through creating a volunteer opportunity.

Click on "Create Volunteer Opportunity" in the utility bar (SF Lightning)
Define who is Managing the opportunity

1. Select who is Managing the Volunteer Opportunity:

**Partner:** means that one of your partner organizations is managing the volunteers. These will usually be created in the partner portal by your partners themselves, but this option allows you to administratively create a partner-managed opportunity on their behalf.

**Affiliate:** means that YOUR organization will be managing the opportunity on behalf of one of your partners (either your staff or volunteer leaders will be managing the project and its volunteers)

2. **Organization Served.** All organizations in status "Active Partner" will appear in this picklist alphabetically. Choose the partner who will either be managing the project, or, in the case of an affiliate-managed opportunity, the organization that will receive the volunteer service.

3. Click the next button.
Define the Volunteer Opportunity

1. Give the Volunteer Opportunity a Descriptive Name

2. Describe in detail what the project is about and as much information as possible about what volunteers will do. (This will be a 'text' description - but you can optionally add hyperlinks, photos, and styles to the description after the opportunity is created and before you publish it. To do this you will click on the "Add/Change Description" link in the Volunteer Opportunity overview AFTER the opportunity has been created.)
3. **Opportunity Coordinator**: This is the person who will be in charge of managing the volunteers at this project. They will receive emails notifying them of volunteer signups and removals, and will be listed on the public site as the contact for this opportunity. For partner projects the picklist will indicate all valid contacts related to that organization. For affiliate managed opportunities, the list will include your staff, your organization’s volunteer leaders, and the partner organization’s contacts who have partner portal access.

**Define the Volunteer Opportunity (continued)**

1. **Primary Impact Area**: Choose one from the drop down list.

2. **Populations Served**: (optional). Choose one or more populations that benefit from the service, and click on the right facing arrow to move them to the 'chosen' list. The chosen list can remain blank if desired.

3. **Type**: **Project or Activity** - A project is a volunteer opportunity that will result in service hours. An Activity is any other opportunity you may which to make available to volunteers such as recognition events, trainings, social, etc. If you choose Activity you will be presented with another screen subsequently asking additional definitions of the type of activity you are creating.

4. **Disaster Opportunity Type**: By default, "Not Disaster Related" is selected for you. However if you wish to designate the opportunity as an emergency preparedness or Disaster Response & Recovery related opportunity you can do so.
5. **Minimum Age** -- what is the youngest age where a volunteer could attend on their own. (If under 18 you can ask they bring a parental consent, but the parent doesn't need to accompany them)

**Minimum Age (W/ adult)** -- to encourage family volunteering -- we'd like you to set the youngest age where a minor could attend this volunteer opportunity while accompanied by an adult, parent or guardian. (An adult can then create a Family Team - and then sign up anyone who meets the minimum age w/adult threshold. Those younger than the minimum age will NOT be able to sign up on their own.

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**Defining the Opportunity (Continued)**

1. **Schedule Type:**

   **Date and Time Specific** - This is intended as an opportunity where you need a certain number of volunteers to attend and volunteer together. It takes place on a specific day with everyone starting at the same time and the opportunity ends at a defined time. This could happen just one time, or on a recurring basis (weekly, monthly, etc). You define how MANY volunteers can sign up for this opportunity, and they will see exactly when they are scheduled to attend.

   **Individually Scheduled** - Some organizations need volunteers on an ongoing basis, and are happy to arrange the time and duration for each volunteer to fit their schedule. Examples might be "Office help needed" or "Mentors or Tutors needed". You might welcome volunteers at defined times of the day, (i.e. Mondays - Fridays anytime from noon - 5 pm)... but exactly when the volunteer will attend, and for how long, is flexible and something you will schedule directly with the volunteer. If you need volunteers every day -- this is the preferred schedule type (as opposed to creating many, many date and time specific opportunities). [See this next article for information on how to create "Individually Scheduled Opportunities.](#) For the rest of this walk-through - we'll focus on creating date and time specific opportunities, but you must choose one or the other schedule type as part of creating an opportunity.

   **In this example we are going to create a Date and Time Specific Opportunity!**

2. **Good For Groups** - check this box if the opportunity is good for groups to participate in.
3. **Court Ordered Allowed** - check this box if you are running a court-ordered program and designating which opportunities court-ordered volunteer CAN volunteer for.

4. **RSVP/ Seniors** - If you are running an RSVP program, or want to flag in search certain projects as being well-suited to seniors - check this box.

Click the NEXT button to continue.

**Location Screen**

1. **Location**: A picklist of all locations used for Volunteer Opportunities by the managing organization is available to choose from. If the location doesn't already exist, the last item on the picklist should be chosen "Add a Location (next step)" - which will allow you to create a new Location for this Volunteer Opportunity

If you select 'Add a location' you'll be prompted to fill in the location details in the next screen:

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![Location Screen](image-url)
The location screen only appears IF you choose "Add a location" in step 1 above. Give the location a recognizable name for future reference and put in the address information. The Special Directions field is optional and can be used to include parking directions and other descriptive info.

*(No need to put in a link to a map, a google map will automatically be created and published for the location)*

**Registration Type and occurrence defaults**

Depending on the schedule type you chose earlier - you'll be prompted for defining the Registration Type.

![Volunteer Opportunity Wizard](image)

1. **Registration Type:**

   There are two registration types to choose from:

   - **Sign Up** - Sign-up registrations are ideal for date & time specific opportunities. You specify how many volunteers you need, and volunteer can simply sign-up and commit to attend on that date and time. The volunteer is automatically confirmed and receives automatic notification via email that they are scheduled to attend. When all slots are gone, sign-up is cut-off (though people have the option of being added to a waiting list, which will automatically alert them if volunteers cancel and space becomes available!)

   - **Express Interest** -- Choose this registration type if you want to review the volunteer before confirming them for the opportunity. They will not be able to automatically sign-up, but will just express interest. The opportunity coordinator will then receive email notification whenever a volunteer expresses interest -- and will have to log-in and either CONFIRM or DECLINE the volunteer for the opportunity. All "To Be Scheduled" opportunities are
automatically set to 'express interest' since you'll have to contact the volunteer to arrange for a specific date and time for them to volunteer with you.

For more information on the different combinations of Schedule Type and Registration Type see this article on the 4 different types of volunteer opportunities that can be created in the wizard.

2. **Minimum Attendance** is automatically set to 1. This is used for internal reference only and can be set to any value. **Maximum Attendance** appears only for date and time specific opportunities. This determines how many people are allowed to sign up or express interest before the project is marked as 'full'. (At that point, volunteers can choose to be added to a waiting list)

3. **Does this occur on a regular schedule.** If you select "no" you will have the opportunity to create one or more individual occurrences (dates and times) when the opportunity will take place. If you select "yes" you will be led through steps to create a series of occurrences that take place in a regular pattern (weekly, monthly, etc.)

We'll select "No" here. but see further down for the steps if "Yes" is selected.

Click Next.

**When does the occurrence take place?**

![Volunteer Opportunity Wizard](image)

When you click on the Date field - a popup calendar will appear allowing you to select the date. Choose a start time and end time from the drop down picklists. Click NEXT.
Occurrence 'success' screen

You'll see that your occurrence has been created, and now have the option to create and date & time occurrence if you wish. Selecting yes will let you enter another date and time for this opportunity. You can create as many occurrences as you wish by saying YES after each occurrence. When you have no more to create, select NO and click NEXT.

Thank you Page

This ends the flow. Now click "Finish". You can then go to the Volunteer Opportunity Tab and look at the most recently created Opportunity record. From there you can optionally customize the opportunity description (as described above), add related skills, and add custom questions. The opportunity will not be published until you review and publish the opportunity.

The flow if you selected "Yes" to the question "Does this occur on a regular schedule"

If you choose Yes when asked "Does this occur on a regular schedule" you are guided through the steps to create a recurrence.
The recurrence flow

A recurrence can take place Daily, Weekly or Monthly. After making this selection and clicking on NEXT you'll be asked to define the schedule of the recurrence.

Note: Do not create recurrences that have more than 52 dates or it will produce an error. Only 52 occurrences can be created at one time in a recurrence.

follow the steps to define the pattern of your recurrence.
In this example, we have created occurrences that take place on the 2nd Thursday or every month from March to September (a total of 7 individual occurrences, all created through one step!) After you click NEXT, you'll reach the Finish screen!