Volunteers: Overview

Speech	Cursor/On-Screen
The Volunteer Add-on has three components: • Volunteer Types • Volunteer Facts • and the Tasks list	Show image listing different components
Volunteer Types	Show image "Volunteer Types"
Volunteer Types are checkboxes in volunteers' contact records.	Show Console. Open Contact list. Double-click to open Volunteer Contact record
In the contact record, on the Basic tab, you'll see the Volunteer Types.	Show Basic tab with Volunteer Types expanded
Volunteer Types allow you to classify your volunteers into the different areas they work. Perhaps this volunteer helps out with fundraising, or often volunteers at special events.	Point to Volunteer Types mentioned
This area is completely customizable, so you can add all the Volunteer Types that are appropriate for your volunteer needs. Using Volunteer Types is very useful for classifying your volunteers to make it easy for you to search for this information later on.	
For example, perhaps you have a big event coming up, and you want to find all the volunteers in your database that like to help out at special events.	Close contact record
In your Contact list, search by Volunteer Type to look for all the special event volunteers.	Search Type: Volunteer Type Volunteer Type: Special Event
Click Search, and Sumac finds all the volunteers who like to help at special events! Now you could send them all an email to ask if they'd like to help out.	Click Search. Point to list of volunteers. Point to Email.
Volunteer Facts	Show image "Volunteer Facts"
Volunteer Facts are another supporting component of the Volunteer add-on. They reside on the Facts tab of your volunteers' contact records.	Open Contact record. Go to Facts tab.
Click New, and at the bottom of the list of Facts, you'll see an area for Volunteer Facts.	Click New. Point to Volunteer Facts
This allows you to record quite a variety of facts about your volunteers, like their Preferred Tasks, which are the kinds of jobs your volunteers want to do for you.	Point to Preferred Task

You can also record any skills or qualifications for your volunteers to specify what they are able to do. Some typical examples of Skills recorded for volunteers are things like having a valid police background check, or having completed any necessary volunteer training programs you might have, or the ability to speak different languages.	Point to Skill
Skills are completely customizable, so you can track whatever kinds of skills are important for your volunteers to have.	
You can also record the days and times that your volunteers are available,	Point to Available
Or unavailable,	Point to Unavailable
As well as any recognition they may have received for completing tasks for you, like a recognition letter or token of appreciation.	Point to Recognition
You can even record your volunteers' time commitments to specify how many hours they are committed to volunteering with you. For example, you can specify that a volunteer is willing to work up to six hours each month.	Point to Time Commitment
Recording these Volunteer Facts is very important to volunteer management because Sumac uses all this information when it helps you figure out which volunteer is the most appropriate candidate for a task that needs doing.	Point to/circle all Volunteer Facts.
Tasks List	Show image "Tasks List"
The final component of the Volunteer Add-on is the Tasks List.	Show console. Open Tasks
The Tasks list allows you to define a list of jobs you need your volunteers to complete. It also helps you figure out which volunteer is most appropriate for each job.	
You'll notice that along the right of this window, there is a list of Workers. Sumac calls volunteers "Workers," and it produces this list of workers by finding every contact in your database who has one or more Volunteer Types chosen in his or her contact record.	Point to Workers list
Either create a new task,	Point to New
Or search for tasks that need to be completed.	Search Task Date "today"
When you select the task,	Select the task
You'll notice that a bunch of coloured boxes appear...	Point to list of workers/coloured boxes
to help you match the most appropriate volunteer to the selected task.	
Green means the volunteer has what is required,	Point to a green box
Yellow means the volunteer might have what is required,	Point to a yellow box
And Red means that the volunteer does not have what is required.	Point to a red box

Once you've found a volunteer who is appropriate for the job, select his or her name in the list of workers.	Select an appropriate volunteer
Under Special Editing, click to assign this worker to this task.	Point to Assign
Check out more training videos to learn more about how you can use Sumac to manage your volunteers.	