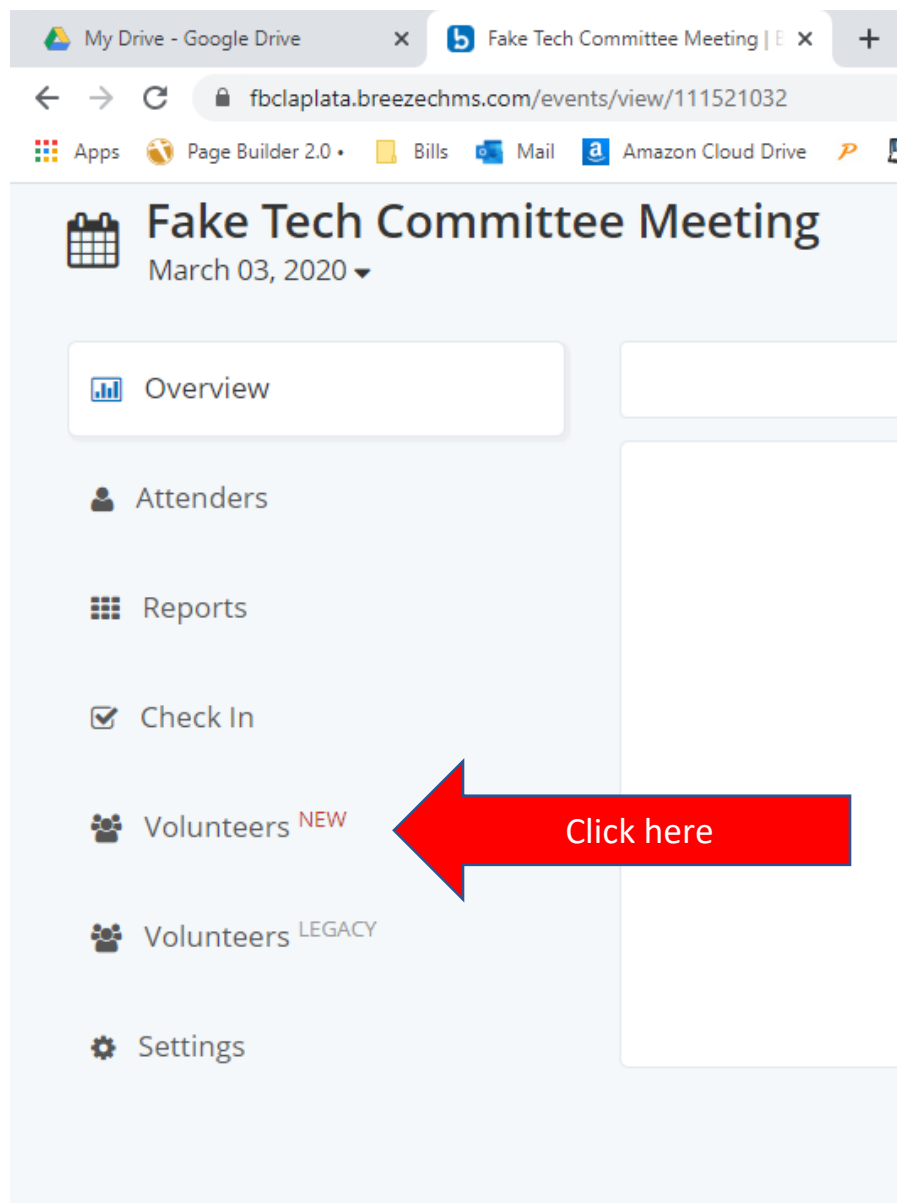# First Baptist Church of La Plata
Breeze Training Documentation
Requesting Volunteers for an Event

Volunteer Management:

If you need volunteers for an event, or a regular rotation schedule for something like ushers or security & safety, Breeze makes it easy to request, assign, and contact volunteers

Role Name	Leader ⓘ	Quantity Needed	
☰ [ ]	None ▾	None Set ▾	⊗
☰ [ ]	None ▾	None Set ▾	⊗
☰ [ ]	None ▾	None Set ▾	⊗

⊕ Add a new role

◯ Group Roles by Teams   [Cancel]   [**Continue to Add Volunteers**]

- Add role names (e.g., Teacher, Assistant Teacher, and Helper) for each type of volunteer needed
- If you want to assign a leader for the specific role, drop down the leader box, and select from the available people (if you specified everyone, all users will be listed. If you limited by tags, only people in the specified group(s) will be listed
- Select how many of each kind of volunteer you require
- If you need more roles, click the "Add a new role" button
- The three lines next to each role allow you to move the list order around
- Click Continue to Add Volunteers

There are two options for scheduling volunteers:

1. Assign them
2. Invite them to select a date/time and role

How would you like to schedule volunteers?
You can change this option at any time.

[**Assign**]   [**Invite**]

I'd like to assign my volunteers to specific roles and dates.   I'd like my volunteers to sign up for specific roles and dates.

- For each role, click on the add volunteers to this role link

- Search by a person's name OR recent volunteers OR by tag

Send your volunteers a schedule by clicking on the "Send volunteer schedule" link in the upper right corner.

The box that opens allows you to customize who receives a copy, the message they receive, and you can request them to RSVP

Once you like the options, click "Send"

Send Schedules   ✕

Send this to

| All volunteers scheduled on selected events ▾ |

Only send to volunteers in the following roles

☑ Teacher

☑ Assistant Teacher

☑ Helper

Subject

| Volunteer Schedule for Fake Tech Committee Meeting |

Message

B *I* U 🔗 A ▾ A ▾ 🖼 Upload   Mail Merge ▾   <>

Hi [FIRSTNAME],

Thanks so much for your willingness to serve at First Baptist

Will send from busygirlks@gmail.com   Cancel   **Send**

Send Schedules   ✕

B *I* U 🔗 A ▾ A ▾ 🖼 Upload   Mail Merge ▾   <>

HI [FIRSTNAME],

Thanks so much for your willingness to serve at First Baptist Church of La Plata! Here is your volunteer schedule for the upcoming Fake Tech Committee Meeting events.

🔗 Add Attachment(s)

Additional Options

☑ Allow volunteers to RSVP to their assigned dates

☐ Attach a PDF showing the master schedule (shows names of who is serving on the selected dates in the selected roles)

☐ Also send this schedule as a text message

Will send from busygirlks@gmail.com   Cancel   **Send**

Teacher Reminders ✕

Reminder 1
🕐 *This reminder sends 3 days before the event.*
⚙ Customize

Reminder 2
🕐 *This reminder sends 6 days before the event.*
⚙ Customize

Reminder 3
🕐 *This reminder sends 12 days before the event.*
⚙ Customize

Automatically sent from role's leader between 12pm and 2pm EST   Cancel   Save for... ▾

SET REMINDERS
You can set up to three automatic reminders for an event's volunteers
• Next to each role, click the "Volunteers will receive one reminder" button
• The box at left will pop up
• Turn on the reminder with the switch at left
• Click the "Customize" button at right to set options

CUSTOMIZE YOUR REMINDERS

Use the box at right to customize reminders

You can make three reminders per role

Click "Done" when you have customized the reminder

Once you are satisfied with all three reminders, click "Save for"

You can save for:
• This event
• Default for this series
• All roles

One Reminders ✕

Timing   Send this reminder 3 days before the event   ▾

Subject   Volunteer Reminder for [EVENTNAME] on [EVENTDATE]

Message   **B** *I* U 🔗 **A** ▾ **A** ▾ 🖼 Upload   Mail Merge ▾   <>

Hi [FIRSTNAME],

This is a friendly reminder that you're scheduled to fill the [ROLENAME] role at [EVENTNAME] on [EVENTDATE].

📎 Add Attachment(s)

Options   ☑ Allow volunteers to RSVP to this message
☐ Also send this reminder as a text message
☐ Only send to volunteers who have not RSVPed ❓

Automatically sent from role's leader between 12pm and 2pm EST   Done

BLOCKOUT DATES

When you assign volunteers, it's a good idea to confirm whether they are available.

This is done using blockout dates

- Drop down the Send Schedules to Volunteers box
- Select Send Blockout Date request

Send Blockout Date Request

Send To
Volunteers scheduled for this event (change)

Subject

Let Us Know When You're Not Available to Volunteer

Message

B *I* U 🔗 A ▾ A ▾ 🖼 Upload Mail Merge ▾ <>

Hi [FIRSTNAME],

We'd love to be able to avoid scheduling you on days you know you will be unavailable to serve.

If you could take a moment to click the link below and let us know of any upcoming days that won't work to volunteer, it would be a big help.

Thanks so much!

📎 Add Attachment(s)

Will send from busygirlks@gmail.com   Cancel   **Send Request**

The box at left will allow you to customize the message the volunteer will receive

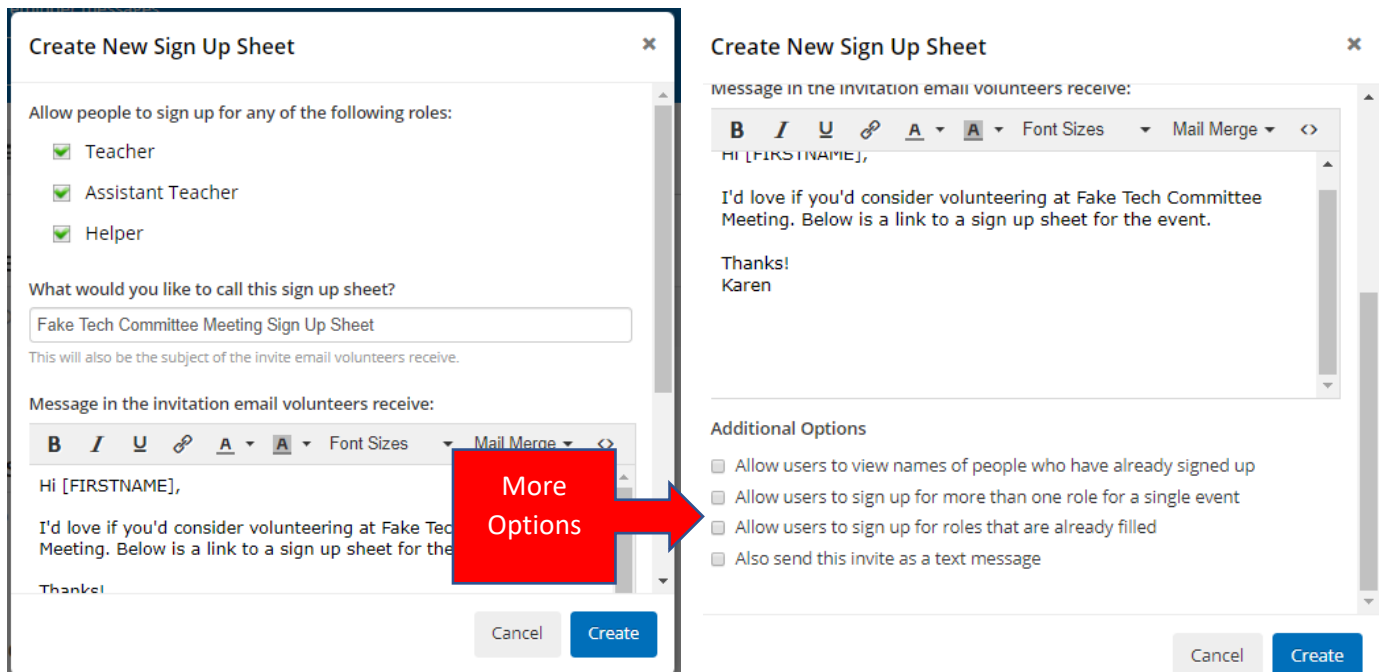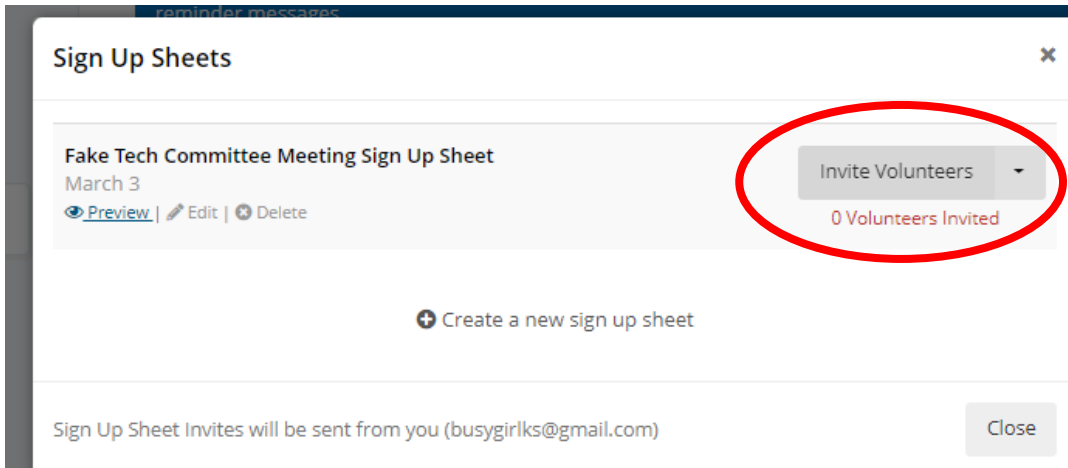Click Send Request when you are done

- This method allows users to pick a date, time, and what role they would like to volunteer for your event
- From the edit event settings page, click Volunteers New, and select "Invite"
- Click "manage sign up sheets"
- You will need to add a new sheet
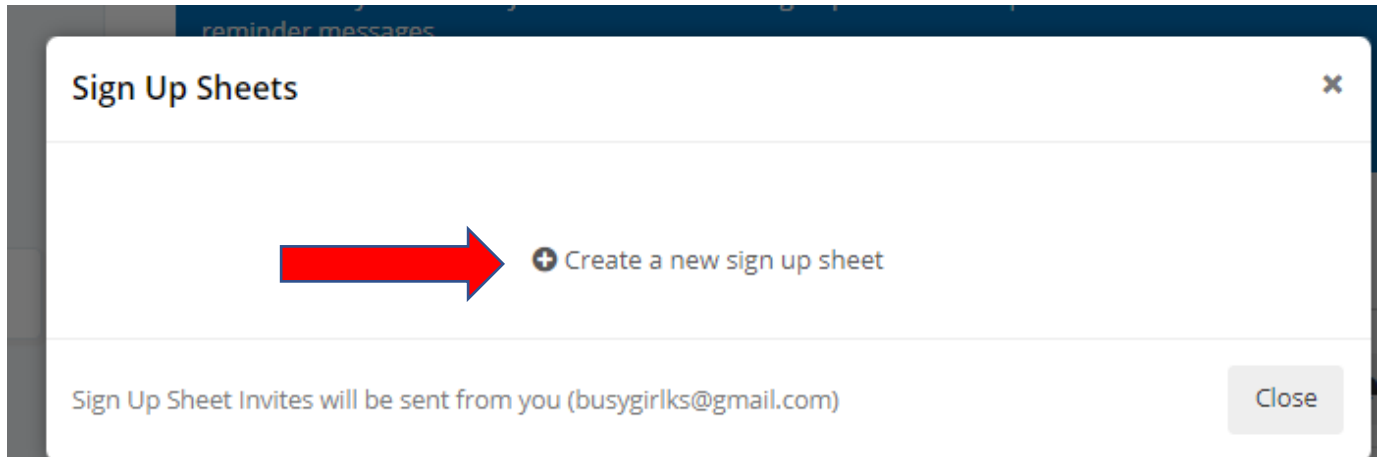
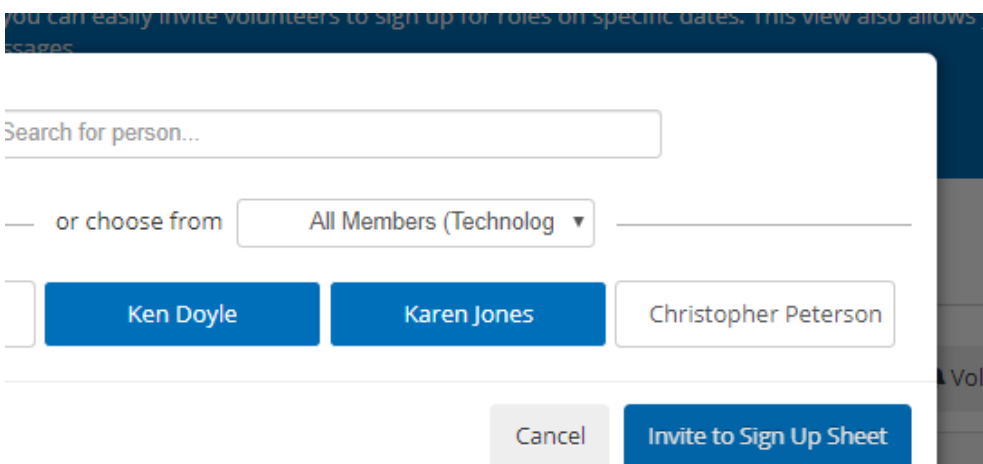Customize what you would like to say on the invitation
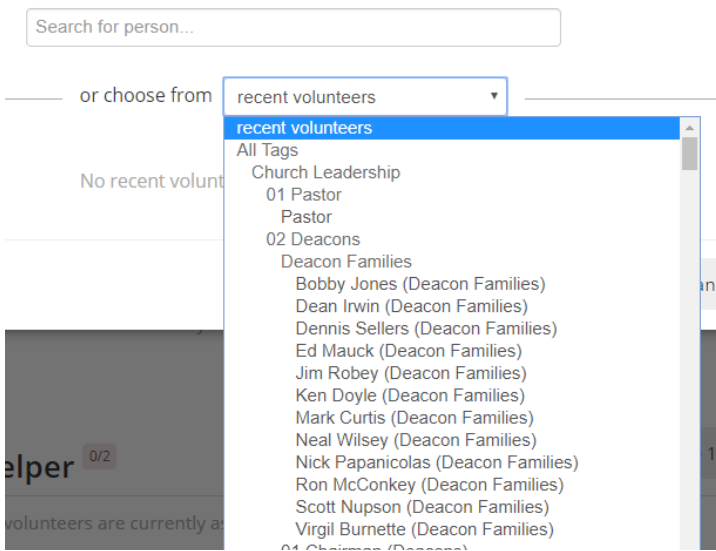

Click Create

Invite volunteers by clicking the "Invite Volunteers" button

Select volunteers the same way as assigned volunteers. Click invite to sign up sheet when done

You can select tagged groups to invite as well

Your invitees will receive an email with a link

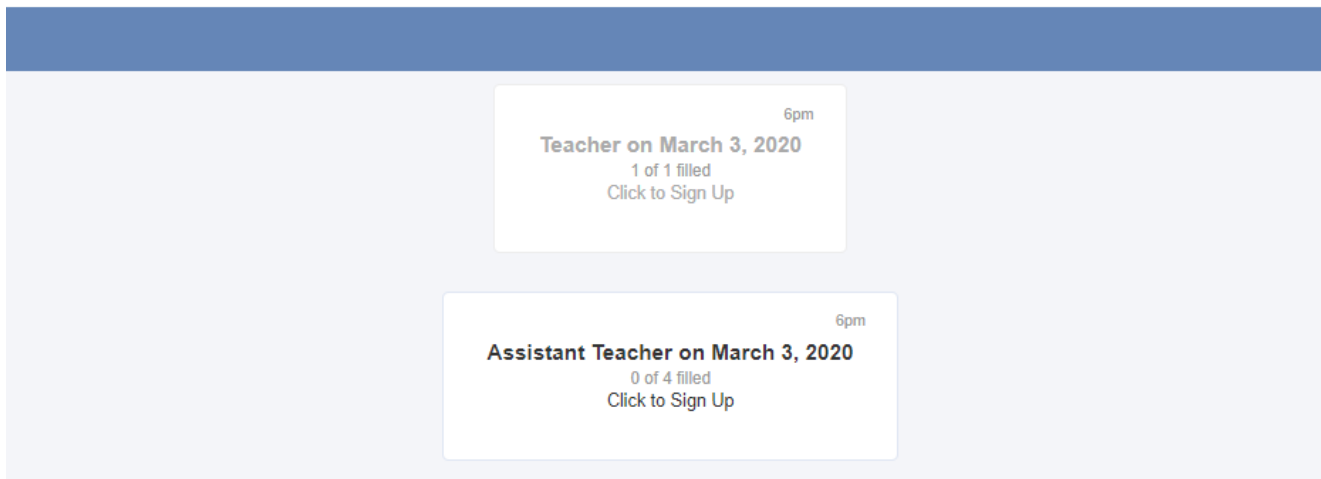When they click on the link, they will see a screen like the one below

Each role will be listed separately, with the date and time of event, and how many are still needed

The invitee can click on any role to sign up

Click on the event to see who has volunteered, and who has accepted or RSVPd (if assigned).

The dropdown box for Manage sign up sheets (in volunteer mode) or Send schedules to volunteers (assign mode) allows you to:

• Send a schedule to volunteers via email • Download a PDF or Excel of schedules • Email volunteers directly • Modify the roles you created • Switch modes	**Manage Sign Up Sheets** ▾ ✉ Send Schedule to Volunteers 📄 Download Schedule as PDF 📄 Download Schedule as Excel ✉ Email Volunteers 👤 Modify Roles ⬤ Switch to Assign Mode
In assign mode, there is an additional option: Request blockout date It is a way for volunteers to notify you of dates they are unavailable.	