Ready-to-Launch Checklist

Use this checklist to go over your Organization and Opportunity settings before inviting staff/volunteers to ensure you're set up for success!

Organization level

Public page

- [ ] The Public Page is the first thing your staff/volunteers are going to see. Use the Public Page to your advantage by adding a logo, cover photo, and description, amongst other features, to make your Organization stand out and motivate your staff/volunteers to sign up!

Sign-up workflow

- [ ] Have you enabled all the necessary steps for recruitment at the Organization level?

- [ ] What would I require initially at the Organization level even before the Opportunity level?

- [ ] Be sure you have all the form questions necessary for recruitment set up in the "Form Questions" tab and verify you have all your important questions set to "required."

- [ ] You may want to consider adding a custom message to your sign-up workflow. A custom message can provide the next steps for staff/volunteers, thank them for their interest, guidance on what to expect next, etc.

Tip

You can test your sign-up workflow to see what it will look like from a staff/volunteer perspective.
Open the public page in an incognito window and sign up to the Organization/Opportunity to test the staff/volunteer sign-up process.

Opportunity level

Public page

- [ ] The Public Page for your Opportunity is another great tool to get your staff/volunteers interested in the Opportunity that you're offering. Use the Page description tool to give staff/volunteers more information on the program you're running, add external links, motivate them to sign up for shifts, etc.

Sign-up button state

- [ ] Be sure to set your Opportunity Sign-Up button to OPEN when you're ready to have volunteers sign up. When set to OFF, staff/volunteers will not be able to sign up for the Opportunity.

Sign-up workflow

- [ ] There are steps in the workflow at the Opportunity level that you don't have at the Organization level, so be sure to verify you have enabled all the steps you need for staff/volunteers to complete the sign-up process.

- [ ] Make sure you have all the form questions necessary for recruitment set up in the "Form Questions" tab.

Shift selection

- [ ] If you would like for staff/volunteers to sign up for their own shifts, the "Shifts" step of the sign-up workflow must be on at all times! Be sure to verify you have this setting enabled in order for staff/volunteers to sign up themselves.

- [ ] You have access to the shift selection link via your Opportunity recruitment page. You can copy and share this link at your convenience.

Settings

☐ Be sure you've adjusted your visibility settings, found in your general settings, to have your Opportunity visible to staff/volunteers.

☐ You have the option to allow staff/volunteers to remove themselves from an Opportunity or a shift. Be sure you've adjusted these settings to fit your expectations.

☐ You can adjust your notification settings at any time. Be sure to review the settings and adjust them to your expectations.

☐ If you would like for staff/volunteers to be able to check themselves in and out for shifts, be sure you've adjusted your attendance settings to allow for your staff/volunteers to do so.

Roles and shifts

☐ It's important to ensure you've added all the Roles you need for this Opportunity, as well as ensure they're set to the correct visibility. Should the Roles be private or public? Who should have access to these Roles?

☐ Be sure to verify that all of your shifts are published, that each shift has at least one Role, and that all your shift information is accurate.

Live mode

☐ If you're planning on using the Mobile App as a means for staff/volunteers to check in and out for their shifts, be sure to enable Live Mode beforehand.

☐ You can enable and disable Live Mode at any time. You can find this setting in the Mobile App settings of your Opportunity.

Tip

You can use colors to categorize your shifts. See how you can leverage shift colors by changing the view of your schedule from list view to calendar view.