SERVE365

Step-by-Step Guide for Agency Managers

This guide will show you how SERVE365 can benefit you and how you can use each of its tools.

As of 9.29.22, we have completed our merger between SERVE365 and Campus Engage, and serve365.org is home to our volunteer platform.

If you have any questions, please contact the Dan River Nonprofit Network at serve365@danrivernonprofits.org.

Always find the most recent version of this guide online at serve365.org/about-us!
# Table of Contents

- Become an Agency Manager .......................................................... 3
  - For an Existing Agency ......................................................... 3
  - For a New Agency ............................................................... 5
- Needs and Events ............................................................................ 6
- Post .............................................................................................. 6
- Manage ......................................................................................... 8
- Background Checks ......................................................................... 10
- Hours ............................................................................................ 11
  - Approve Hours ......................................................................... 11
  - Add Hours Manually ............................................................... 12
- Glossary ....................................................................................... 13
BECOMING AN AGENCY MANAGER

For an existing agency

To become an agency manager for an existing agency, you will first need to visit serve365.org and create an account by clicking the SIGN UP button.

The site should walk you through several required steps. Remember to click the CREATE YOUR ACCOUNT/CONTINUE button at the bottom of each page!

If you have an existing agency manager that you’re replacing or joining, ask them to add you on the EDIT AGENCY page by entering your name or email in the Agency Managers box.

The starred manager is the primary agency manager, who can add and remove other managers. You can also change that from this page!

If your agency hasn’t used SERVE365 in a while and your previous agency manager has left or doesn’t remember their login, don’t worry! Email us at serve365@danrivernonprofits.org, and we can get this part set up for you.
You should now receive an email (or notification on the site, if you've opted out of emails, although we don't recommend this, since it's easier to get updates if you keep emails on.) from SERVE365 to let you know you've been set as an agency manager.

Log in and get started!
BECOME AN AGENCY MANAGER FOR A NEW AGENCY

Go to serve365.org and click the button under VOLUNTEER NOW, reading Click here to register your organization.

You should be taken to the SIGN UP YOUR AGENCY page, which will ask you to fill out the sign-up form.

At the bottom, click REQUEST ACCOUNT. We will receive a notification and likely approve your agency within the next couple days. If you come into the office to sign up, we can approve you immediately.
NEEDS AND EVENTS

POST NEW NEEDS/EVENTS

Select the MY AGENCY button on the top navigation bar, which will take you to the EDIT AGENCY page. This should also be the page you’ll first see when signing in.

From there, select the NEEDS or EVENTS tab. These pages are pretty much identical.

Once you’re on the NEEDS or EVENTS page, scroll down to select the ADD NEW NEED/EVENT button.

Fill out your details on the page that pops up.

You can add as many INTERESTS as are relevant! More is better!

PRIVATE needs will only be visible to those who have a link to them. Use this for needs you intend to restrict to a set group you’ll send the link to. PUBLIC needs will show up to everyone.
While creating your NEED, it will ask you what the DURATION is. If this is an ongoing need, i.e., it is a continuous need that your agency has and is not happening on a specific date, we recommend selecting the Ongoing Need INITIATIVE. It will add this banner asking volunteers to reach out to the agency manager about the timing of their first shift, since this need often does not have a concrete date or time attached. It will also add this reminder to the volunteer’s email confirmation.

Once you’re done filling out your details, click CREATE EVENT/NEED at the bottom of the page.
NEEDS AND EVENTS

MANAGE NEEDS/EVENTS

Select the MY AGENCY button on the top navigation bar, which will take you to the EDIT AGENCY page. This should also be the page you’ll first see when signing in.

From there, select the NEEDS/EVENTS tab.

From here, you should be able to delete needs or events by selecting them with the checkboxes and then clicking the trashcan icon.
To edit needs or events, click the EDIT button underneath its name and make any updates that need to be made. Remember to scroll all the way to the bottom of the page and click UPDATE NEED/EVENT to save your edits!

To view all the people who have responded to your need or event, select it with the checkbox and click EXPORT RESPONSES/RSVPS.

This will download a spreadsheet of all the people who have responded to your need, as well as any notes they have attached to their response and their answers to the default need questions: *What is your t-shirt size; Please enter emergency contact information; and Are you responding to this need to fulfill court-ordered community service hours.*
BACKGROUND CHECKS

SERVE365 does not innately offer the ability to perform background checks on volunteers, but you can access this service by signing up with a third-party partner.

Click on MY AGENCY, and from there select STERLING VOLUNTEERS.

Once you're on the STERLING VOLUNTEERS page, you should see this, if you aren't signed up. Select the CLICK HERE TO REGISTER button to start signing up for the background check service.

It will take you to this outside webpage, where you can register. Under VOLUNTEER MANAGEMENT SYSTEM, be sure to select Get Connected (that's the name of the software that SERVE365 uses!). Select SUBMIT at the bottom to begin your registration process with Sterling Volunteers.

Sterling Volunteers will set up a meeting with you to discuss pricing; they have two options that are about $30-$40 per background check.
HOURS

APPROVE HOURS

Select the MY AGENCY button on the top navigation bar, which will take you to the EDIT AGENCY page.

From there, select the TIME TRACKING tab.

Scroll down to see a list of volunteer hours that have been put in for your approval by volunteers. Select them by the checkbox and then hit the APPROVE or DENY button, to confirm their volunteer hours.
### ADD HOURS MANUALLY

Select the MY AGENCY button on the top navigation bar, which will take you to the EDIT AGENCY page.

From there, select the TIME TRACKING tab.

Scroll down to where you can input hours.

Select the need and volunteer who you’re adding hours for.

If you are logging anonymous hours, for example, if you have volunteers whose hours you wanted to track but they did not have accounts, select Anonymous User from the volunteer dropdown menu.

Fill out the date and hours worked fields, and hit SUBMIT HOUR ENTRY.

These hours will be automatically approved, as an agency manager is submitting them.
**Agency:** Any organization on the site. Agencies are able to list volunteer needs and events.

**Agency Manager (Primary):** The agency manager who is able to add and delete agency managers, in addition to being able to post needs and events, approve hours, etc. Every agency must have exactly one primary manager.

**Agency Manager (Secondary):** An additional agency manager that can do everything the primary agency manager can do except add and delete new agency managers. Agencies can have multiple secondary managers or no secondary managers.

**Need:** A volunteer shift that is posted by an agency on SERVE365. See your listed needs and who’s responded to them under the NEEDS tab.

**Event:** An event hosted by a community nonprofit or other organization that is coming up. See who’s RSVP’d to your events under the EVENTS tab.

**Interest:** You’ll indicate interests in association with needs you post. Interests usually refer to specific skills that you’re looking for for that specific volunteer need. Every need posted must have at least one associated interest.

**Cause:** Agencies will indicate causes that they support on their agency page. Agencies must list at least one cause that they work to benefit.

**Fanning:** Users can “fan” an agency to get notified of upcoming events and volunteer opportunities that they post. You can see how many fans your agency has by going to the STATS tab and selecting MORE.

**Sterling Volunteers:** This is a third-party site that SERVE365 partners with that allows agencies to pay a fee for background checks on their volunteers. If your agency signs up with Sterling Volunteers, the REQUIRE BACKGROUND CHECK option when posting a need will become available.