PTO Manager
Volunteer Builder
Advanced User's Guide

About This Guide:

This user's guide covers more advanced Software Coordinator functionality, such as importing Volunteer/Student information, customizing content for your school and integrating Parent Express (PEX) with Volunteer Builder.

If you're just getting started, please refer to our Quick Start User's Guide for help on activating your PTO Manager account and creating the basic framework for using the Volunteer Builder program.

If you need help or have a question, please email us at support@ptomanager.com or call us at 800-557-2670.

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1. Set-Up Functions (Software Coordinators)

This section reviews how to use the functions under the Set-Up tab. Only the software coordinator(s) will have the Set-Up tab. You can have as many software coordinators as you would like; however, it is important to realize they will have full access to your system.

The Set-Up section is the same regardless of whether you use one or both modules of PTO Manager.

There are 3 main areas in Set-Up:
• Users
• Email Reports
• School

Users

For adding, editing, and assigning permission levels to your users as well as running the Mass Update function at the end of your school year.

Add Users:

a. If you are adding a number of volunteers, it can be quicker to add them in set-up and ask them to edit their own profiles (to add interests and students) at a later date.
b. If you are only using Finance Manager, Set-Up is the only way to add users and assign permission levels.

Find Users: You can see when a volunteer last accessed PTO Manager by going to this section. If you go to **Set-up ➞ Users ➞ Find Users** and hit **Search**, you will see the field "Last Logged in Dtime". This field tells you the last time a user logged into the system.

Note: The time recorded is GMT (Greenwich Mean Time) which is 4 hours ahead of EST.

Mass Update: There are several clean-up tasks that should be performed by the software coordinator at the end of the school year to prepare the database for the next year. (Refer to Step 4 in the Volunteer Builder Quick Start Guide for details about this function).

User Permissions: There is one extra permission level available in Set-Up that you won't find in Volunteer Builder. Set-Up is the only place you can assign someone to the Software Coordinator permission level. This is the highest level of access and anyone with this permission level has full access to your site. If you're using both Volunteer Builder and Finance Manager, Set-Up is a quick and easy way to review permission levels for all volunteers in both modules.

Volunteer and Student Import: You can import both volunteer information and student information into Volunteer Builder. Refer to Step 2 of this Guide for detailed instructions about using this feature.

School

This is the place to edit basic contact information for your school. It's also where you can change the domain name for your PTO Manager site and the address for bounced emails as well as indicating participation in the Pledge Program (all of these functions are described in Step 1 of the Volunteer Builder Quick Start Guide). Finally, this is where you can integrate Volunteer Builder and PEX which allows you to send out great looking emails with lists that you generate with Volunteer Builder. Refer to Step 3 of this Guide for detailed instructions about setting up the PEX integration.

Email Reports

This function allows you to see a big picture of all emails sent (Mailing Type Report) as well as listing each individual email (Sent Items Report).

2. Volunteer and Student Import

The import function can be found under the Set-Up tab. You can use this import to not only add new volunteers/students to your database but also to update existing volunteers/students by downloading their information to Excel (through the student report), editing it, and then loading it back in via the import tool. The file format you must use to import can be found HERE. You can also generate the import file by downloading the student report under **Volunteer Builder ➞ Reports ➞ Students** (please note you have the option to include both pending and "do not include me in directory" people in this report) and then using that file layout. **The file must be Excel 2003 or earlier—Excel 2007 will not work.**

Note: To import "class" you need to have both teacher and grade and they must match your database exactly. The format needs to be teacher:grade So if the teacher is Smith and the grade is 1 in Volunteer Builder, the field should be populated Smith:1.

➞ Click **SET-UP.**
➞ Click **USERS.**
➞ Click **VOLUNTEER AND STUDENT IMPORT.**
➞ Click **BROWSE** to select the Excel file to be imported.
➞ Click **IMPORT DATA.**

The following Volunteer information will be imported/updated:

FIELD	REQUIRED?	FORMAT	LENGTH	NOTES
VB internal ID	no	number		*see below*
Email	no	text	80	
First Name	yes	text	30	
Last Name	yes	text	30	
Address Line 1	no	text	30	
Address Line 2	no	text	30	
City	no	text	30	
State	no	text	2	The 2 character state code
Zip	no	text	10	The 5-[4] zip code. 5 and 4 can be separated by any non-numeric character.
Phone	no	text	13	A 10 digit phone number. The digits can be separated by any non-numeric characters.
Business Phone	no	text	19	A 10 to 15 digit phone number. The digits can be separated by any non-numeric characters. Digits 11 to 15 are taken to be the extension.
Other Phone	no	text	13	A 10 digit phone number. The digits can be separated by any non-numeric characters.
Do not email me	no	"Yes" or "No"		
Do not include me in school directory	no	"Yes" or "No"		
Inactive Date	no	date		Formatted as '01-Jan-2009'
Dollars Donated	no	currency		
Custom 1	no	text	80	
Custom 2/Company	no	text	80	
Custom 3	no	text	80	
Custom 4	no	text	80	
Comment	no	text	unlimited	

The following Student information will be imported/updated:

FIELD	REQUIRED?	FORMAT	LENGTH	NOTES
VB internal ID	no	number		*see below*
First Name	yes	text	30	
Last Name	yes	text	30	
Class	no	text	43	If the text in the field matches "class.teacher:class.grade" for an existing classroom in the school, the class_id will be populated for the student. If the text does not match, an error message will be generated.
Student Custom 1	no	text	80	
Student Custom 2	no	text	80	
Student Custom 3	no	text	80	
Student Custom 4	no	text	80	

Note: The field labeled "VB Internal ID" is generated by Volunteer Builder. When you are importing from any list except a list that you get from running the student report, this field should always be blank. When you are importing from a list that was generated from the student report, **do not modify this field**. If you add new users to the student report list, the "VB Internal ID" field should be blank for the new users.

Note: If a field is defined in the database and not defined in the import file, the database value will remain and not be overwritten with blank. This means that a field can never be set to blank as a result of an import.

Note: If you import Volunteer/Student information, then your volunteers will not receive an automatic email with their password and the school's URL. As above, you will need to send an email directing them to the **Forgot Password Link**. To send this email to everyone in your system, click on **Volunteers ➞ Find Volunteers**. Click **Search** to bring up everyone in your database and then click **Send email to this list**. You can then compose your own Welcome Email directing them to the site and the Forgot Password link. No need to start from scratch—you can modify the New User email found under Content Manager.

Volunteer Matching (duplicate checking)

A volunteer will be considered a duplicate if:

The “VB Internal ID” matches an existing one for this school.
(If the “VB Internal ID” is defined but does not match a user in any school, an error message will be generated.

It will be flagged as a duplicate if:

- The first name matches (case-insensitive), AND
- The last name matches (case-insensitive), AND
- All of email, phone1, phone2, phone 3 and address line 1 are blank on the incoming data and blank on the matching volunteer

Or, it will be flagged as a duplicate if:

- The first name matches (case-insensitive), AND
- The last name matches (case-insensitive), AND
- The cell or home phone numbers are defined and match the cell or home phone number of the volunteer (the cell can also match the home or visa versa) OR
- The email is defined and matches OR
- Address line 1 is defined and matches

Or, it will also be considered a duplicate if:

- The first name matches (case-insensitive), AND
- The cell or home phone numbers are defined and match the cell or home phone number of the volunteer (the cell can also match the home or visa versa) OR
- The email is defined and matches OR
- Address line 1 is defined and matches

If none of those situations apply, the user is considered a new volunteer.

Student Matching (duplicate checking)

A student will be considered a duplicate in the database if:

The student id matches an existing one for this school.
(If the student id is defined but does not match an existing student in any school, an error message will be generated.)

If the first name, last name, and class are blank then this not a student and the data is ignored
It will be flagged as duplicate if:

- The first name matches (case-insensitive), AND
- They have the same parent.

Otherwise, the student is considered a new student and is added under the matching parent.

Note: A student is entered into the database multiple times—one for each parent. Each occurrence will use a separate matching process.

Note: To update your information, run the Student Report, click **Save list to my computer** and enter your new data. Enter only the required fields. Remember, do not delete any columns and do not have a blank row at the top of your spreadsheet. You can then run the Volunteer and Student Import function.

3. Volunteer Builder/PEX Integration

Volunteer Builder can now be used in conjunction with Parent Express to allow you to send out great looking emails with lists that you generate with Volunteer Builder.

The Volunteer Builder/PEX integration is for general emails only. Those are emails generated when you search using either **Volunteer Builder → Find Volunteers or Setup → Users → Find → Find Users.**

In order to use the VB/PEX integration, you must have established a free PEX account at www.ptotoday.com/parentexpress.

If you try and sign up for the free account and it tells you that your school has already signed up for one, you can contact us at support@ptomanager.com to find out who established the account.

To use the PEX/VB integration, follow these steps:
→ Go to **SET-UP → SCHOOL.**
→ Select the box **USE PEX AS MY EMAIL PROGRAM** (bottom of page)
→ Click **SAVE.**
→ Log out of PTO Manager.
→ Log back into PTO Manager.

Next time you go to send a general email, you will be shown a screen that asks you to enter the email subject and the list name (these can be the same). When you press send, you will be taken to PEX Groupvine where you will be asked to enter your PEX email and password.

Note: You must allow pop-ups for this transfer to work because it will be a new window.

At this point, you follow the steps in PEX to create a new email or copy an existing email. If you are unsure how to do this, there is lots of helpful information on our website www.ptotoday.com/parentexpress as well as on the Groupvine website that Volunteer Builder logged you into.

When you are finished creating your email a record of the email will be stored in the Email Archive section of your PEX account. You will also be able to track open rates and bounced emails in PEX. In addition any new subscribers pulled from Volunteer Builder will be added to your PEX members list.

Note: If you are having a problem, try logging into PEX at www.groupvine.com to make sure you have the correct PEX login information.

4. Customizing PTO Manager

As the **Software Coordinator** you can customize many areas of PTO Manager to better reflect your individual school and parent group. In many instances you'll likely want to use the default text but the system is very flexible and allows you to edit all the text that appears on your site. For example, you might choose to include instructions in both English and Spanish. Or you might choose to edit the welcome email that is automatically sent to new volunteers when they sign up.

Note: Although you can use PTO Manager with most of the common browsers, you must have Internet Explorer for Windows to do most of the editing discussed in this guide.

What you can customize:
• Text on the screen—everything from instructions on how to fill in a form to the 'about our school' page.
• Custom fields
• Logos
• Email text

There are two ways to customize content:

1. **Content Editor:** You can customize everything in the above list (except emails) using the Content Editor. The system makes it easy to toggle between VIEW and EDIT mode. When you are in EDIT mode, you can click on the content you wish to change and use the Content Editor to make your changes.

2. **Content Manager:** You can change the text in system emails by using the Content Manager. The link for the Content Manager is on the left side of the screen under Administrative dashboard.

Using the Content Editor

In the Administrative dashboard on the left hand side of your screen you'll see a section titled **Edit Mode** with on/off buttons. You can use these buttons to toggle into **EDIT** mode. Simply click in the **On** circle and you will be in **EDIT** mode. Click in **Off** to go back to the normal view. You can go into **EDIT** mode on any page in the system.

Once you are in **EDIT MODE**, it's very easy to see what you can edit by looking at the **OVERRIDE** or **REMOVE/EDIT** links. Each piece of content that you can edit will have an **OVERRIDE** link next to it. Clicking this link will take you to a page where you can edit the relevant text. When content has been modified, the options will change to **Edit/Remove**.

Once you have finished making edits, you can click on **EDIT MODE** and switch back to viewing the site as usual.

The best way to demonstrate this function is by going through an example. We'll use the example of customizing your school's information but the same steps apply for any piece of content you wish to customize.

To Customize Your School Information

Edit the **About Our School** Link:
→ Turn **EDIT MODE** on.
→ Click the **OVERRIDE** link next to **About Our School** on the top right of the screen.
→ Replace **About Our School** text with something personal to your school. For example, "About George Washington PTO". Simply type the new text in the field provided. You can format the text using the icon buttons. The icons are similar to other software products.
Note: Before you use the formatting icons, you need to highlight the text you wish to change.
→ Click **SAVE**.

Edit the text on the **About Our School** page:

→ Click on the link you created in the above step, ie. "About George Washington PTO".
→ Click the **OVERRIDE** link just underneath **All about our school**. Enter in a brief description of your school and/or parent group. (Don't worry too much about getting the text perfect, you can come back and edit this at any time). You can format the text using the icon buttons. The icons are similar to other software products.
→ Click **SAVE**.

Don't forget to change the title of the **About Our School** page as well! We suggest having the title match the link you created above, ie. "About George Washington PTO". Simply click the **OVERRIDE** link next to the title and follow the same steps.

To Customize Text and Custom Fields

The easiest way to see what text can be edited is to look at all the **OVERRIDE** links when you're in edit mode.

You might have noticed a few **Custom Field** labels when you were adding volunteers, students, and events. You can use these fields for additional information you want to keep track of for both volunteers and events. For example, you might want a field for 'Profession' so you can get a better idea of your volunteer's skills or input for Career Day. Or you might want to include an 'Items Needed' field for events.

You can edit these fields directly on the main volunteer screen or the main event screen.

→ Click **VOLUNTEER BUILDER**.
→ Click **VOLUNTEERS** or **EVENTS**.
→ Click **ADD VOLUNTEER** or **CREATE NEW EVENT**.
→ Turn **EDIT MODE** on.
→ Click on **OVERRIDE** or **EDIT/REMOVE** beside the **custom field** you wish to change.
→ Enter the name of that field, ie. 'Profession' or 'Items Needed' in the above example.
→ Click **SAVE**.
→ If you wish to add a new volunteer or event you can complete the rest of the fields. If not simply click the **CANCEL** button. You will be returned to the previous screen and your edits will be saved.

Once you **OVERRIDE** a field label, you'll notice **OVERRIDE** is replaced with 2 links: **Edit** and **Remove**.
EDIT: To edit the field label text you just created. If you have a typo or want to change the wording slightly, click the **EDIT** link.
REMOVE: Removes your custom text and uses the system default for the field label.

Navigating the Site in Edit Mode

From any screen you can turn **EDIT MODE** on and view the **OVERRIDE** links that indicate what content can be changed. You can also navigate as usual in **EDIT MODE**; it just might be a little confusing finding your way among all the override links.

In some instances you might need to go through a process to find the page you wish to edit. For example, your event chair volunteers have requested that you provide more instructions on how to fill in all the fields when they are entering a new event. Now that you know how to use the Content Editor it's easy to change the text and add more detailed instructions. But first you must access the **Add New Event** page. You will need to go through the process of adding a new event even though you aren't really adding an event at this time.

Navigate to the **Add New Event** page and make your text changes. When you are finished click on the Cancel button; your edits will be saved and you will return to the previous screen without adding a new event.

Interrelated Page—A Note of Caution

It's important to note that many of the pages are interrelated and some of your text changes might affect more than one screen. If you make a change on one screen or one button, it might be reflected on others as well.

There are many instances of these interrelated pages so it's a good idea to be fairly familiar with PTO Manager before making a lot of text changes.

Customizing Your School Logo

You can replace the default **My School** icon (upper left hand corner) with your own school logo or graphic.

- → Turn **EDIT MODE** on.
- → Click on the **OVERRIDE** link next to the My School icon in the top left.
- → Click on the **BROWSE** button beside the **New Logo** field. Select your graphic from the correct file on your computer. **Note:** Please put "border-style=none" in the HTML style field.

Size: Your graphic can be up to a height of 80 pixels and a width of 230 pixels.

File Type: Your graphic must be a .jpg or .gif file. If your graphic is not rectangular it will need to be a GIF file on a transparent background.

Note: The logo will replace your school name. (We assume your graphic will contain your school name). So if you have already changed your school name and then add a logo that does not contain the school name, the school name will no longer be visible.

Important: Once you have changed the logo, you need to exit the program and your browser completely and log back into the program to see the new logo!

Customizing Your Welcome Page

- → Turn **EDIT MODE** on.
- → Click **NAVIGATION**.
- → Under **Public Site** in the middle of the screen, click **VIEW SITE**.
- → Click **OVERRIDE** or **EDIT** to change the text and click **SAVE**.
- → Click **NAVIGATION** and **Reset to Login View** to return to the main page.

Customizing Views for Specific Permission Levels

- → Turn **EDIT MODE** on.
- → Click **NAVIGATION**.
- → Under **Setup Module**, deselect software coordinator and click the appropriate Volunteer Module permission level.
- → Click **VIEW SITE**.
- → Again, follow steps from above to make the necessary modifications.
- → Verify that the changes display on the correct permission view.

More Information About Navigation

It's a good idea to make sure you view your site exactly as your volunteers will see it. Software coordinators have access to all areas so it's easy to forget exactly what your volunteers are seeing when they log in.

Two ways to view the site as a volunteer:

1. Mock Records: sign up a pretend volunteer and assign the volunteer the basic volunteer permission level. This will let you log into your site as a volunteer. We suggest using names that are obviously 'fake' so you don't end up trying to assign a phantom person to an event. When creating these mock records, use a different email address (but one you have access to) if possible. When switching between identities, please make sure to exit all the way out of Internet Explorer (or whatever browser you use).

2. Navigation Link: click on the navigation link on the left hand side of the screen. You can change the settings on this page to view the site as your volunteers will see it.

To view your site as a volunteer:
- ➞ Deselect **Software Coordinator** under the **Setup Module**.
- ➞ Click the circle next to **Volunteer** in the Volunteer Module column.
- ➞ Click **VIEW SITE** and you'll see all pages exactly how a volunteer sees them. Notice how the links in the Volunteer Builder section change. For example, the volunteer doesn't see the **Reports** link.
- ➞ To switch back, simply click on **NAVIGATION** and click **RESET TO LOGIN VIEW** to return to the original setting.

Customizing Email Text

As we mentioned at the beginning of this guide, there are two ways to edit content. Up until this point we have been editing content directly on the screen. To edit the text in the email messages the system sends, you need to use the Content Manager.

Some of the system email messages are automatically generated, i.e. the welcome email each new volunteer receives after signing up. There are many other emails that are not automatically sent out, i.e. message to recruit volunteers for an upcoming event. For these emails, you will always have the option of editing the text before sending it but you can also edit the default text in Content Manager. This is a good idea if it's an email you use often.

Personalizing Emails: You can send a generic message to a list of people and have each person receive information specific to them. See below for detailed instructions.

Important: Remember that your site is live. This means that any email text you change will take effect immediately. It's a good idea to double-check your edits to make sure you haven't forgotten anything! Maybe even send yourself a test message to see how it looks.

To review and edit email templates:
- ➞ Click the **CONTENT MANAGER** link on the left hand side of the screen.
- ➞ Click the **Emails** link at the top of the screen to jump to the Emails section. You'll see a chart that describes the emails on the system. They are listed in alphabetical order.
- ➞ Click the **OVERRIDE** or **EDIT/REMOVE** link to open the email you wish to edit.
- ➞ When editing emails you will see two fields: Subject line and Message Body.
- ➞ You can personalize the emails with the fields shown on the screen. For example, to include first name, use **${firstName}**.
  Note: Please capitalize exactly as the fields are shown in the template. You might want to cut (ctrl-c) and paste (ctrl-v) the field names directly into your email copy. Don't forget to add the $ and {}.
- ➞ Click **SAVE** to save your changes or click **CANCEL** to cancel your edits and return to the Content Manager.

The system-generated email templates are listed below:

EMAIL TYPE	EMAIL PURPOSE
Email Change By Administrator	Automatically sent by system when email for a volunteer is changed by the software coordinator
Email Change By User	Automatically sent by system when email for a volunteer is changed by the user
Email Declined	Automatically sent by system when a new volunteer is not approved by the administrator
Event Recruitment	Default template to use when an administrator is recruiting volunteers
Event Reminder	Automatically sent by system X days before an event (as defined in each event)
Event Scheduling	Default template to use when sending emails to people already scheduled for an event.
Forgot My Password	Automatically sent by system to people who forget their password
General	Default template for any general emails sent using the “send email to this list” button.
Inactive	Automatically sent by system when a volunteer is made inactive
New School Email	Automatically sent by system to a new school. Note: since you are already signed up as a new school you won’t need to use this email.
New User	Automatically sent by system to new volunteers—this email contains their password.
Override Software Coordinator Email	Automatically sent by system when new software coordinator needs to be set-up
Password Change	Automatically sent by system when a volunteer changes their password
Permission Change	Automatically sent by system when a volunteer’s permission level changes
Self Registration Confirmation	Automatically sent by system when a new volunteer enters their information into the program

Automatic Emails: PTO Manager sends out automatic emails in many circumstances including when a user's password is changed, when a volunteer is declined or made inactive, and when a permission level is changed. To turn on/off automatic emails, you need to go to **CONTENT MANAGER → EMAILS → OVERRIDE**. You can then turn the email on/off by changing the **Send Email** to Yes or No.

Note: You can only do this if you have Internet Explorer as your browser.

Here is a list of emails that can be turned on/off:
Email Change By Administrator
Email Change By User
Email Declined
Inactive
New User
Password Change
Permission Change
Self Registration Confirmation

Note: If you change the **New User** email to **NO**, then new users will not get their passwords and will not be able to log into the system. For them to get their passwords, you will need to send an email directing them to the Forgot Password Link. We don't recommend changing the status of that email to **NO** except perhaps during your initial testing of the system when you might not want your volunteers logging in.

5. Technical Support & Help

We're here to help. We've provided the Quick Start Guide and this Advanced Guide to help you set up and customize PTO Manager for your school and parent group. Sometimes you might have more specific questions or need some one-on-one help.

Help? link: On every page in PTO Manager you can click on the **Help?** link and view instructions relevant to the page/function you're currently using.

Online Support: When you click the **Help?** link you'll notice a **Live Support** button in the top right. It indicates if our customer service staff is online and available for an online chat.

Email: Email your question to support@ptomanager.com and we'll get back to you as quick as we can.

Call Us: Reach us toll-free at 800-557-2670.