



How-To Guide

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2.0	8/22/2021	Kelly Seymour
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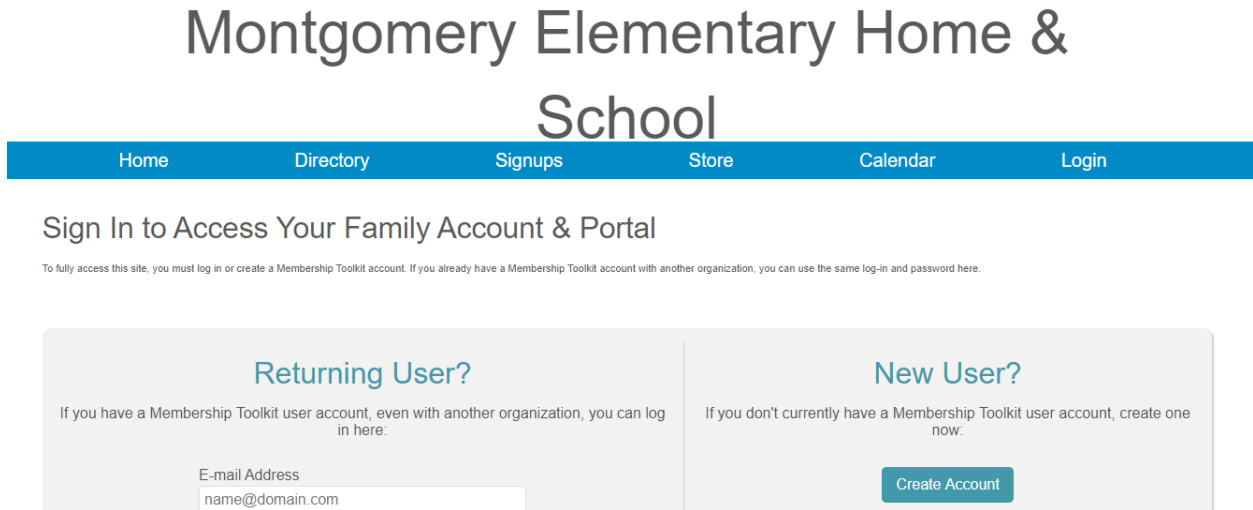
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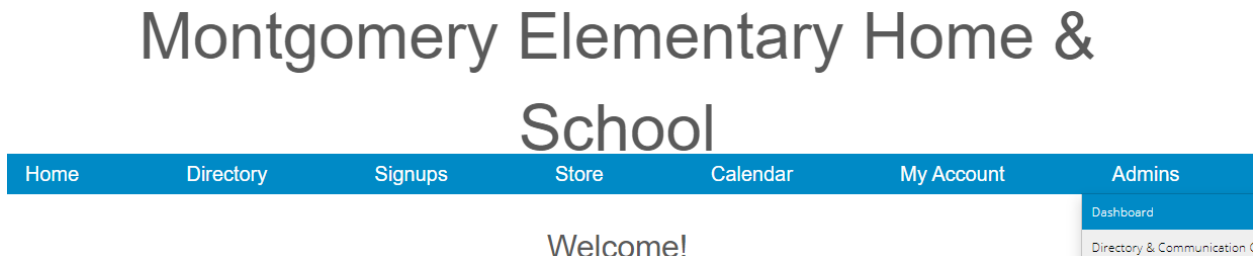
A. How to Log In

1. Log into MTK - <https://montgomeryhsa.membershiptoolkit.com>

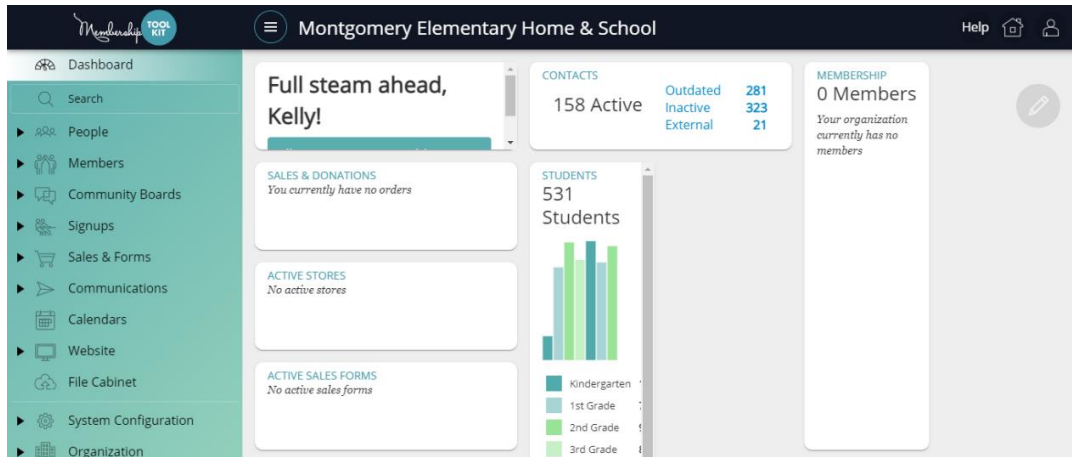
This is what the screen looks like:



2. Hover over Admins in the tool bar, and click on Dashboard:

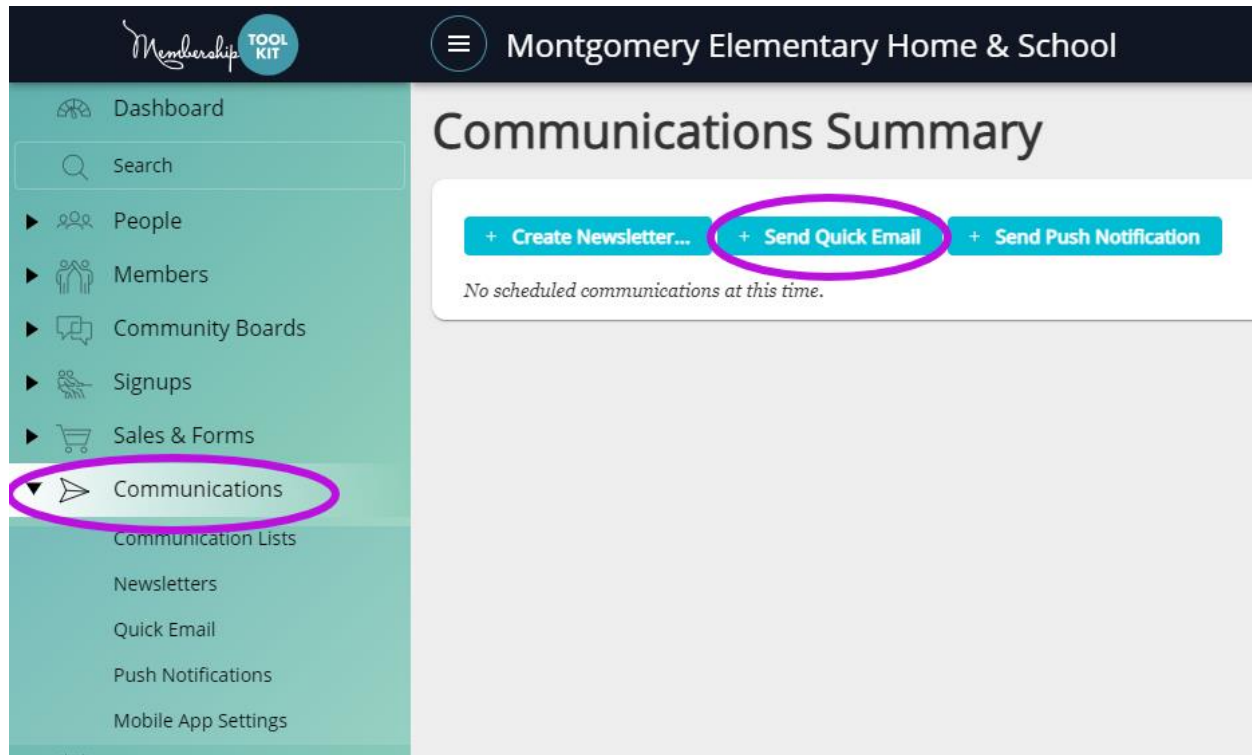


3. Once you're in, it looks like this:



B. How To Send an Email - Sending an email to a specific classroom of parents, or a specific grade level.

1. Click on Communications, then click on "Send Quick Email"



2. Scroll down and find "Message Board: All Parents of students in – [teacher name]". Click on the box next to the classroom of parents to whom you would like to send an email. **If you are sending to an entire grade of classes, you must select EACH teacher for that grade.**

- Message Board: All Parents of students in - Bell, Angie (22 addresses)
- Message Board: All Parents of students in - Bucker, Bridget (27 addresses)
- Message Board: All Parents of students in - Capasso, Tara (29 addresses)
- Message Board: All Parents of students in - Cassidy, Heidi (36 addresses)

3. Scroll down and fill in the fields (see below). If you do not need to insert a sign-up link in your email, you may click on SEND NOW after you've entered all the fields, and you're done!

Send a copy to
If you'd like to send a copy to someone else, enter their email address here (separate multiple email addresses by commas)

From

Send Later at
If you would like to deliver this Quick Email at a later date and time, select that here. Otherwise, leave this field blank to send it immediately.

Subject [use template...](#)

Body

B *i* U **A** ▾ **AA** ▾

Type something

4. {OPTIONAL} If you need to insert a link to sign ups in your email, click on "Insert Link"

From

Send Later at
If you would like to deliver this Quick Email at a later date and time, select that here. Otherwise, leave this field blank to send it immediately.

Subject [use template...](#)

Body

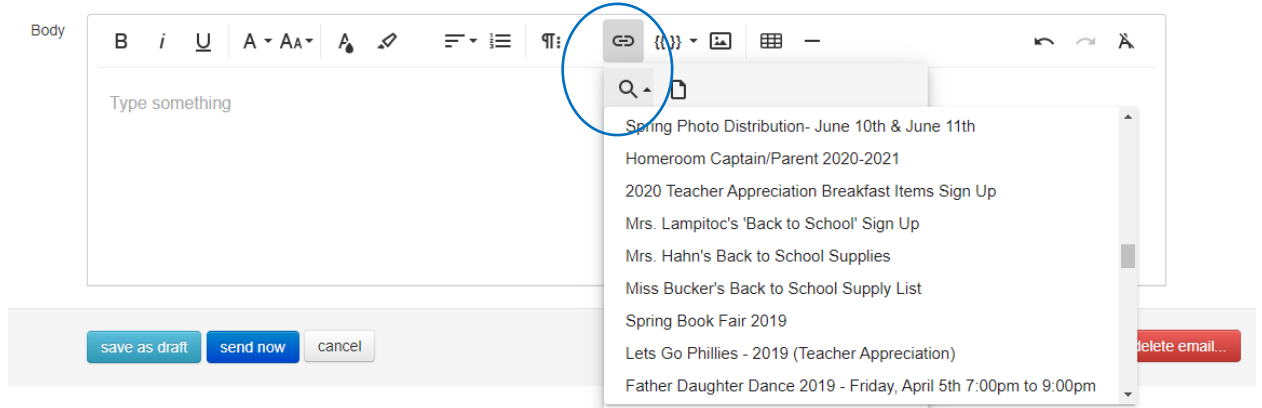
B *i* U **A** ▾ **AA** ▾

Insert Link (Ctrl+K)

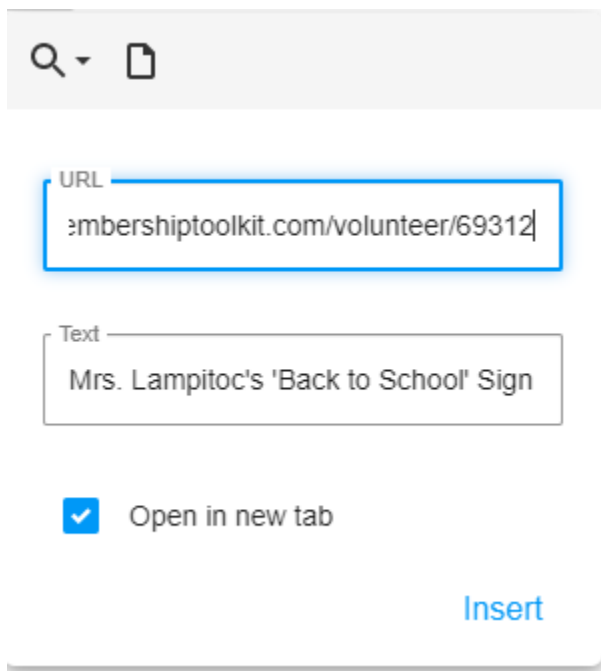
Type something

[save as draft](#) [send now](#) [cancel](#) [delete email...](#)

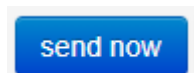
4a. Click on the magnifying glass, scroll down to the **Volunteer Forms** area and find the link to the sign up you would like to include in your email. (Note: there are many old/outdated available links.)



4b. Once you select your link, the box below will appear. Do not change the URL field. The Text Field can be changed to anything you'd like to appear as the hyperlink in the text of your email. Then click on Insert.

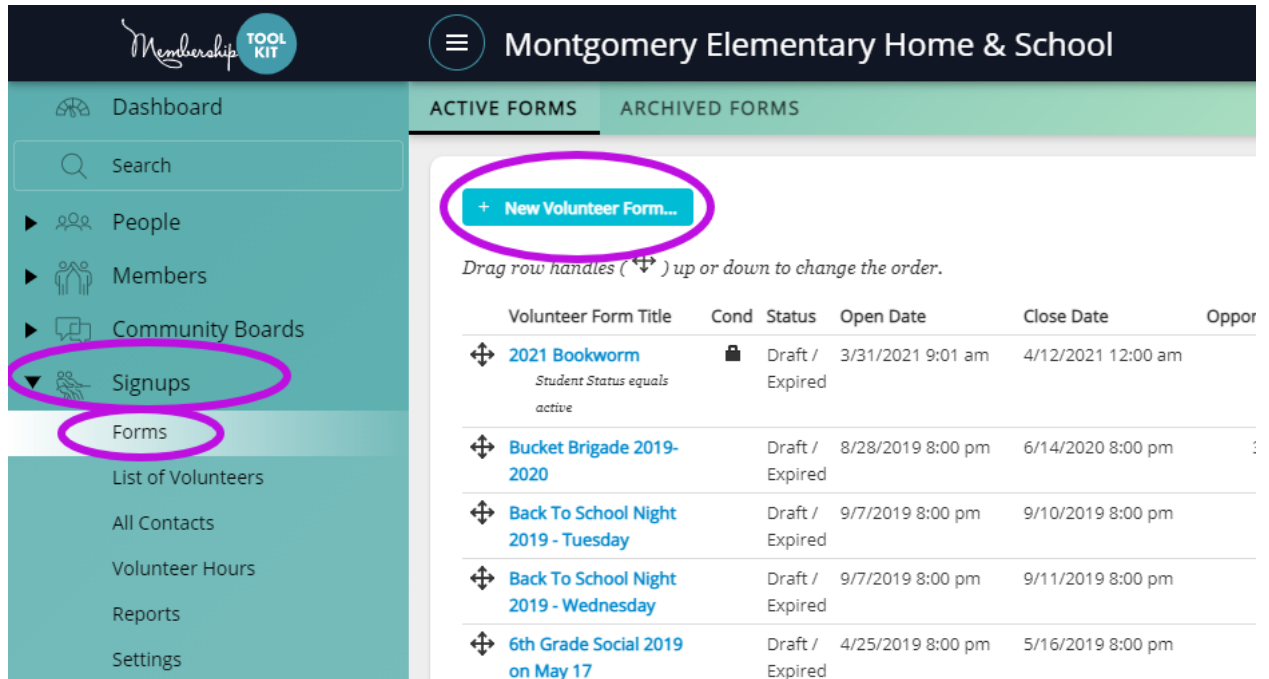


5. Once you have completed your text, click



C. How to Create a Sign Up

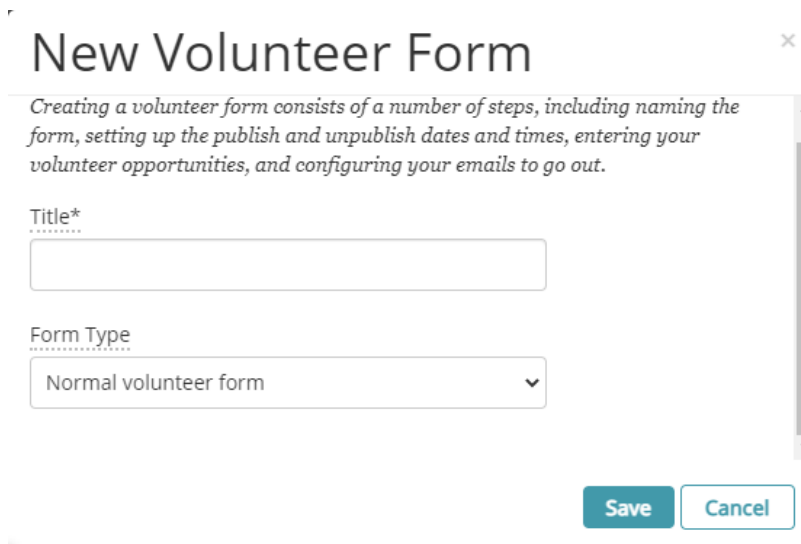
1. Log in to MTK and the Admin Dashboard as described in steps A 1 & 2 in this How-To Guide.
2. Click on Signups > Forms > new volunteer form



The screenshot shows the Admin Dashboard for Montgomery Elementary Home & School. The left sidebar contains navigation options: Dashboard, Search, People, Members, Community Boards, Signups, Forms, List of Volunteers, All Contacts, Volunteer Hours, Reports, and Settings. The 'Signups' and 'Forms' options are circled in purple. The main content area is titled 'ACTIVE FORMS' and 'ARCHIVED FORMS'. A '+ New Volunteer Form...' button is circled in purple. Below it is a table of volunteer forms.

Volunteer Form Title	Cond	Status	Open Date	Close Date	Oppor
2021 Bookworm <small>Student Status equals active</small>	🔒	Draft / Expired	3/31/2021 9:01 am	4/12/2021 12:00 am	
Bucket Brigade 2019-2020		Draft / Expired	8/28/2019 8:00 pm	6/14/2020 8:00 pm	
Back To School Night 2019 - Tuesday		Draft / Expired	9/7/2019 8:00 pm	9/10/2019 8:00 pm	
Back To School Night 2019 - Wednesday		Draft / Expired	9/7/2019 8:00 pm	9/11/2019 8:00 pm	
6th Grade Social 2019 on May 17		Draft / Expired	4/25/2019 8:00 pm	5/16/2019 8:00 pm	

3. Update fields on **New Volunteer Form** pop-up window:
 - a. *What do you want to call this form?* Enter the event name and year for which you are soliciting sign ups (i.e., Mrs. Teacher's Back to School Supplies 2021)
 - b. *What type of form is this?* Normal volunteer form (we do not use Sign Up Genius)
 - c. Click 'save'.



The screenshot shows the 'New Volunteer Form' pop-up window. It has a title bar with a close button (X). Below the title is a descriptive paragraph: 'Creating a volunteer form consists of a number of steps, including naming the form, setting up the publish and unpublish dates and times, entering your volunteer opportunities, and configuring your emails to go out.' There are two input fields: 'Title*' (with a red asterisk indicating it is required) and 'Form Type'. The 'Form Type' dropdown menu is currently set to 'Normal volunteer form'. At the bottom of the window are 'Save' and 'Cancel' buttons.

4. Update fields on the **Overview** tab:
 - a. *Extended Description* – This text will appear below the title of the form in a smaller font. Sometimes it is helpful to include a due date here. One to two sentences works best here.
 - b. *Status* – 4 options
 - a. *Draft mode* is only available to Admins working on the form. Keep in Draft while working on it. Change to Active when ready to publish.
 - b. *Test mode* allows Admins to see the form and to use the form to test the functions. It will be highlighted yellow in the list of Open Forms and can only be seen by Admins. A form in test mode will only be visible if the Publish and Unpublish Dates/Times are current.
 - c. *Active Mode* is when you want your form to be available to your users.
 - d. *Archived mode* is used when you are done with a form and no longer want it to be presented in your list of forms on the Dashboard.
 - c. *Publish Date/Time* – When you want the sign up to be available.
 - d. *Unpublish Date/Time* – When you want the sign up to become unavailable. Please ensure this date is on, or close to, the date of your event.
 - e. Click 'Save'.

The screenshot shows a web interface for editing a volunteer form titled "Test". The interface has a header with the title and a navigation bar with tabs: OVERVIEW, PRESENTATION, OPPORTUNITIES, CONFIRMATION EMAIL, TICKLER EMAILS, FORM CONDITIONS, and CHANGES. The OVERVIEW tab is selected. Below the tabs, there are several input fields:

- Title: A text box containing "Test".
- Extended Description: A large text area.
- Status: A dropdown menu currently set to "Draft".
- Publish Date / Time: A text box.
- Unpublish Date / Time: A text box.

 At the bottom left, there are three buttons: "Save", "Save & Close", and "Close". At the bottom right, there are two buttons: "Duplicate..." and "Delete...".

5. Update fields on **Presentation** tab – controls how the form looks and what the user/volunteer will be able to see on the form.
 - a. *Who can volunteer* – Parent(s) Only
 - b. *Presentation style* – List
 - c. *Show Entries that have passed* – No
 - d. *Show volunteers* – Yes (this allows people to see who else signed up)
 - e. *Show count of open slots* – Yes
 - f. *Show how many have signed up* – Yes
 - g. *Form Stamp* – Normally used when archiving forms, you can use this field to group forms together and make them easier to find later. Example: 2022-2023
 - h. *Preamble* – Into the text box, insert the text you would like to appear at the top of the volunteer page, before the volunteer opportunities. You can include text and pictures. It's a great place to include a motivating volunteer statement and who to contact with questions. However, it is not necessary to put text here. It is more important to put a good description in the Section Information on the Opportunities tab (see #6).
 - i. Click 'save'.

Edit Volunteer Form - "Test"

OVERVIEW **PRESENTATION** OPPORTUNITIES CONFIRMATION EMAIL TICKLER EMAILS FORM CONDITIONS CHANGE

Who can Volunteer: Parent(s) Only

Presentation Style: List

Show Entries that have Passed: No - don't show them

Show Volunteers: Yes - show them

Show Count of Open Slots: Yes - show the count of what's still open

Show How Many have Signed Up: Yes - count them

Form Stamp:

Preamble:
 Paragraph 12pt
 B I U A - A -
 [Rich text editor toolbar icons]
 p

Save Save & Close Cancel

6. Update fields on the **Opportunities** tab: This is where you will put your “jobs” for volunteers and your date/time slots for the shifts you need covered/items needed.
 - a. Click on the blue +add section button. Type the text you would like to appear at the top of your request for sign-ups. Then click Save.

New Section

Section Title

Section Information

Paragraph 11pt

B *I* U **A** **A** [List Icons] [Link Icon] [Image Icon] [Media Icon] [Code Icon]

Here are things the class could use for the playground. Thank you!

This text will appear below the title of this section before the opportunities are listed.

HTML Anchor

Do you want us to include a tag for this section when rendered? If so, enter the anchor name here. If you don't know what this means, just leave it blank.

7. Hover your mouse over the Title of your Opportunities (Playground Equipment Example) and click on the blue “Add Opportunity” button.

Dashboard People **Volunteers** Store & Forms Files Communications Calendars Website Accounting Fundraising Help

Edit Volunteer Form - "TEST New volunteer form"

Overview Presentation Opportunities Confirmation Email Tickler Emails Form Conditions Changes

+ add section *Drag sections and opportunities to rearrange them.*

edit section **Playground Equipment Example**

+ add. Here are the things the class could use for the playground. Thank you!

8. Select “Volunteer Interest” selected, and click on ‘Add’ button.

Add Opportunity

One Time Event
*Choose this type if you are wanting to collect general volunteer interest in your volunteer opportunities.
For example, "Chaperone" or "Year-end Party".*

Volunteer Interest
*Select this type to add single opportunity options for volunteers.
For example, "Fall Party" or "Spring Festival".*

Recurring Event
*Select this type for events that recur on a regular basis.
For example, "Snacks every Monday".*

- Add entries for each Opportunity or Sign Up that you need to fulfill, including how many you need under "Max". Then click on 'Save and Close' at the bottom.

- Hover your mouse over the Opportunity/Sign Up (Footballs), and click on the blue edit button next to it.

- In this screen, you confirm the number of items you want for your Opportunity/Sign Up. In this example, we want 10 footballs, which you must put in to the "Max Vols" field. Ensure the Opportunity Active field = Yes. Click save. Go back and complete steps 10 & 11 for each Opportunity to add the necessary details.

