

Membership Tool Kit - How to Create a Sign up

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

Go to the Admin Button on the right. HOVER over Admin, a drop down appears, click on Dashboard.

Powered by  Google Translate

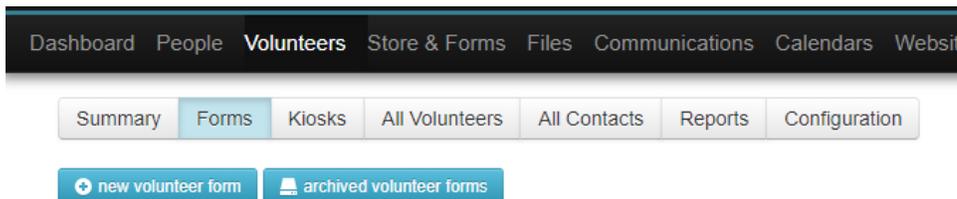
Montgomery Elementary Home & School



When the Dashboard comes up, Click On Volunteers



To create a new sign up, Click on Forms



Click New Volunteer Form - Name it – be sure to use the year

New Volunteer Form

Getting Started

Creating a volunteer form consists of a number of steps, including naming the form, setting up the publish and unpublis emails to go out. Don't worry, we'll guide you through all the steps, just click on the "save and continue >" button at the i the tabs at the top of each screen, and we'll automatically save your progress each time.

What do you want to call this form?

What type of form is this?

If this is a normal volunteer form, choose "Normal."

If you would like to link to a volunteer signup on Signup Genius, choose "Link to a Signup G

[save and continue >](#)

[cancel](#)

Enter in the publish and unpublis dates _ these are the dates you want the sign up to be open for parents to sign up.

Change the Mode to ACTIVE

Edit Volunteer Form - "HR 6th Grade

Overview [Presentation](#) [Opportunities](#) [Confirmation Email](#) [Tickler Emails](#) [Form Conditions](#)

Title

Extended Description

This text will appear below the title of this form in the list of volunteer forms.

Mode

Publish Date/Time

Unpublish Date/Time

[save and continue >](#)

[save and close](#)

[cancel](#)

Click on the Opportunities Tab, Click Add Section, Name the section.

New Section

Section Title

Section Information

Paragraph 12pt

B *I* U **A** **A** [align icons] [list icons] [link icon] [unlink icon] [image icon] [media icon]

p

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

Once you have your section, you need to HOVER over it to add a list of items. Hover and click the add button.

Edit Volunteer Form - "Test"

Overview Presentation Opportunities Confirmation Email Tickler Emails Form Conditions Changes

+ add section Drag sections and opportunities to rearrange them.

+ add... **Fall Party**

save and continue > save and close cancel

Each item/sign up spot is an opportunity.

Please note when you enter each item the ONLY thing that appears to users is the name. so be tend to be more descriptive, example "Paper Plates – quantity 30", "Set up Volunteer - 3PM-5PM". Enter each item and then enter the start date and time and the end date and time of the party. The quantity you need is the max volume.

Opportunity Slots	Displayed as...	Start Date/Time	End Date/Time	Max Vols
	<input type="text" value="Set up 5:45-6:15"/>	<input type="text" value="10/4/2019 5:45 pm"/>	<input type="text" value="10/4/2019 6:15 pm"/>	<input type="text" value="3"/>
	<input type="text" value="Registration 6:00-6:45"/>	<input type="text" value="10/4/2019 6:00 pm"/>	<input type="text" value="10/4/2019 6:45 pm"/>	<input type="text" value="2"/>
	<input type="text" value="Prize Table 6:30-7:15"/>	<input type="text" value="10/4/2019 6:30 pm"/>	<input type="text" value="10/4/2019 7:15 pm"/>	<input type="text" value="2"/>

If you want to send a confirmation email when people sign up, fill out that section.

Overview Presentation Opportunities Confirmation Email Tickler Emails Form

Send Confirmation Email

Include Student information in email

Email Confirmation Text

Paragraph 12pt

B *I* U **A** **A** [align icons] [list icons]

If you want to send people a reminder email, fill out that section.

Overview Presentation Opportunities Confirmation Email **Tickler Emails** Form C

What is a Tickler Email? Ticklers are email templates that you can schedule to send out before c
out.

[add scheduled email](#)

You have no tickler emails for this volunteer form.

[save and continue >](#) [save and close](#) [cancel](#)

Once you are done, hit save and close.

You will need to insert the link into your email.

To do that, draft your email. Put your cursor where you want the link to go.

Click on the link tool in the format menu.

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

Subject [use template...](#)

Body

Paragraph 11pt

B *I* U **A** **A**

Choose Link List, Choose Volunteer Forms and then choose your sign up.

Insert link

Url

Text to display

Title

Link list

Target

- None
- None**
- Standard
- Pages
- Volunteer Forms**
- Stores
- Blogs
- User Profile

- Bucket Brigade 2019-2020
- Fun Run 2019
- RIF Event
- Test**
- jun grade car wash and bake sale 2019
- BINGO NIGHT: Family Bingo 2019!
- Trunk or Treat 2019