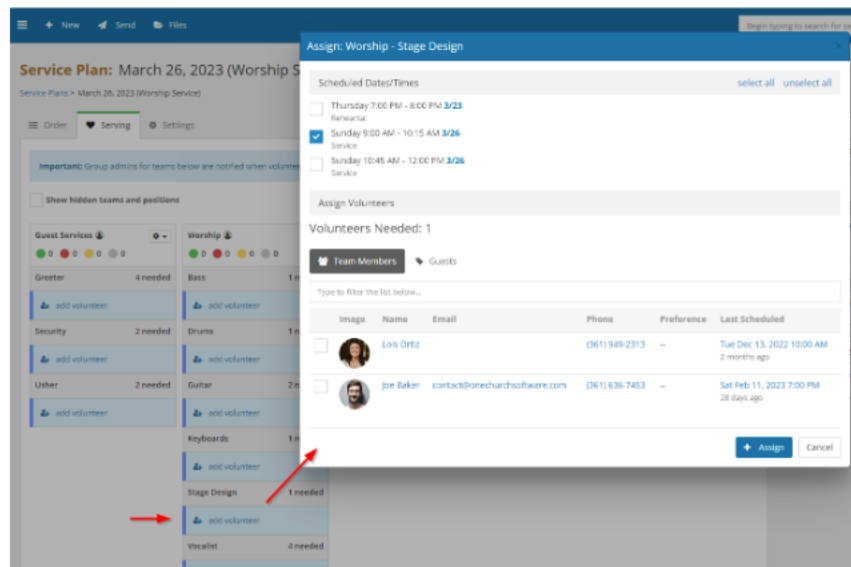


## HOW TO SCHEDULE TEAMS

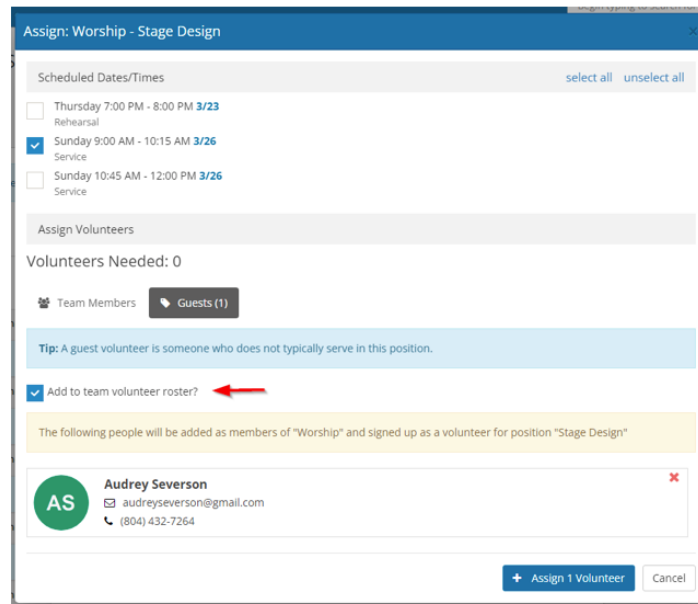
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Click on the "add volunteer" button within the position you want to schedule. This will open up a pop up showing all available volunteers on the team's roster for that position.



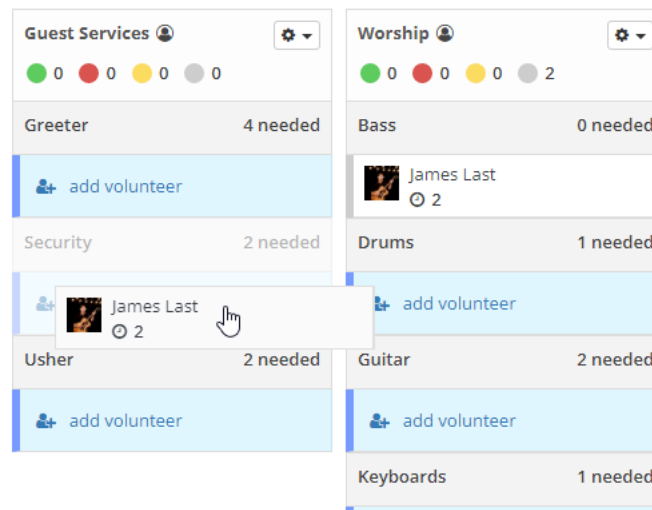
- The list of available volunteers is ordered so that volunteers who haven't served in the position in the longest are shown at the top. Volunteer preferences and any conflicts with other assignments are also considered.
- The top section lets you indicate which time you are scheduling them for. Times are auto selected based on the assigned teams set on the time itself.

You can select up to the number of volunteers needed for the position being scheduled. Apart from those on the team roster, you can go to the "Guests" tab to assign anyone in the system to serve on that team. They do not have to be a current volunteer on that team. However, you can add them to the team roster here if desired so that they appear within the "Team Members" tab for next time.



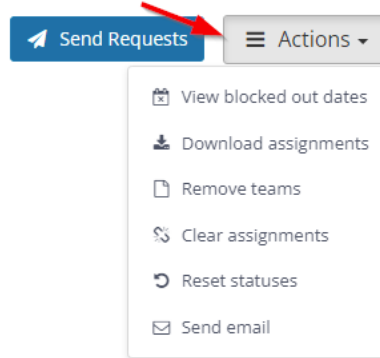
Once finished, click on the "Assign" button in the lower right of the pop up to add the selected volunteers to the plan.

*Tip: you can drag and drop scheduled volunteers from one position to another. If you do, the times they are assigned will be taken from the assigned team settings on the plan times. Note, that this can result in 0 times.*



## Serving Actions

The actions menu in the upper right of the "Serving" tab contains actions that can affect multiple teams on the plan.



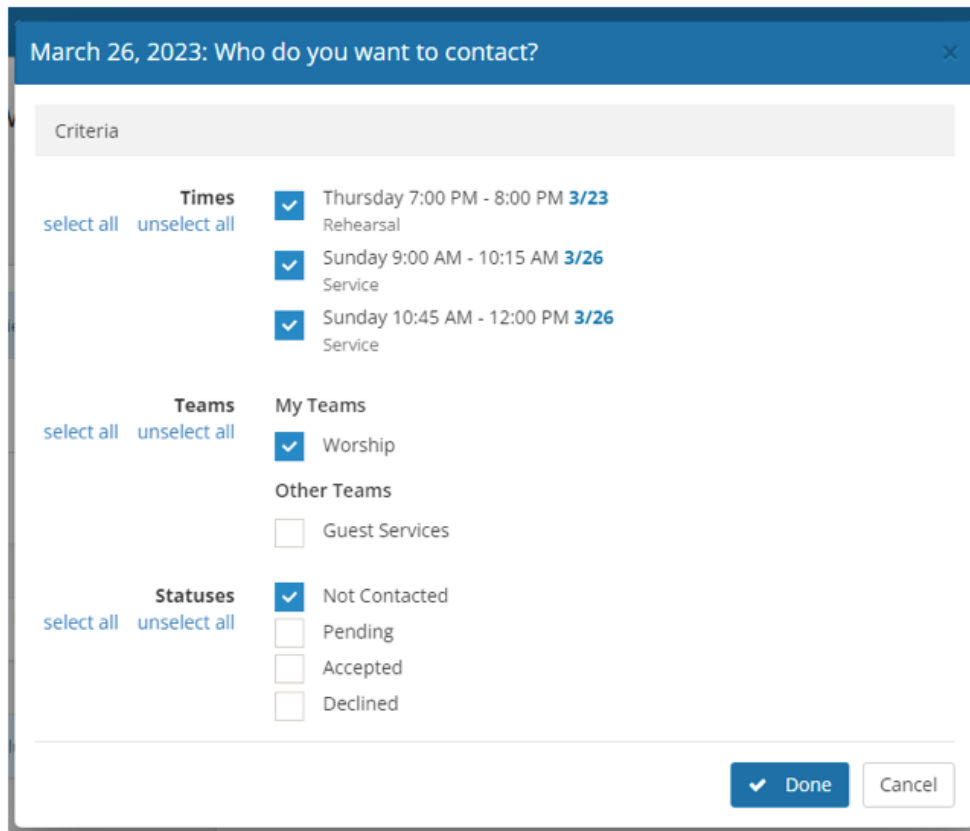
The last four actions work the same as those at the team level except you will be able to indicate which teams they should be applied to. See the previous section for more details on how those work.

The first two actions function as follows:

- **View blocked-out dates** - this opens a calendar view showing dates that volunteers have indicated they cannot serve. Hovering over a date range will provide the reason (if any).
- **Download assignments** - this will allow you to download a spreadsheet of volunteer assignments for selected teams. You can also download as a PDF an attendance marking sheet as well if needed.

## Sending Serving Requests

Once you have finished [assigning volunteers](#) to all needed positions, you are ready to send out serving requests which will allow volunteers to not only be notified they are assigned to serve, but also respond to each assignment (i.e. accept, decline, and others). To do this, click on the "Send Requests" button in the upper right of the Serving tab. This will open up a pop up allowing you to indicate exactly who should be sent this serving request.



The screenshot shows a dialog box titled "March 26, 2023: Who do you want to contact?". It contains a "Criteria" section with three main categories: Times, Teams, and Statuses. Each category has "select all" and "unselect all" links. The "Times" section includes three items: "Thursday 7:00 PM - 8:00 PM 3/23 Rehearsal", "Sunday 9:00 AM - 10:15 AM 3/26 Service", and "Sunday 10:45 AM - 12:00 PM 3/26 Service", all with checked checkboxes. The "Teams" section is split into "My Teams" (with "Worship" checked) and "Other Teams" (with "Guest Services" unchecked). The "Statuses" section includes "Not Contacted" (checked), "Pending", "Accepted", and "Declined" (all unchecked). At the bottom right, there are "Done" and "Cancel" buttons.

Criteria	Selected
<b>Times</b>	
select all unselect all	
<input checked="" type="checkbox"/> Thursday 7:00 PM - 8:00 PM 3/23 Rehearsal	Checked
<input checked="" type="checkbox"/> Sunday 9:00 AM - 10:15 AM 3/26 Service	Checked
<input checked="" type="checkbox"/> Sunday 10:45 AM - 12:00 PM 3/26 Service	Checked
<b>Teams</b>	
select all unselect all	
<b>My Teams</b>	
<input checked="" type="checkbox"/> Worship	Checked
<b>Other Teams</b>	
<input type="checkbox"/> Guest Services	Unchecked
<b>Statuses</b>	
select all unselect all	
<input checked="" type="checkbox"/> Not Contacted	Checked
<input type="checkbox"/> Pending	Unchecked
<input type="checkbox"/> Accepted	Unchecked
<input type="checkbox"/> Declined	Unchecked

By default, this will return uncontacted volunteers on teams you manage (i.e. as a group admin) for all plan times. However, this can be adjusted as needed. Click on the "Done" button in the lower right to be taken to the next screen where you can see which volunteers matched the criteria.

March 26, 2023: Send Serving Requests

Recipients (2) [edit list](#) check all uncheck all

filter people below...

Name	Assignment(s)	Email	Phone
<input checked="" type="checkbox"/> James Last	Bass (Worship)	support@onechurchsoftware.com	
<input checked="" type="checkbox"/> Mary Kelly	Vocalist (Worship)	Mary_Kelly@fake_email.com	(855) 932-2060

**Note:** Recipients will not see each other's email address nor each other's replies.

Email Message

**Subject \***

March 26, 2023 (Worship Service)

**Body \***

B i U A | [Text Formatting Icons]

Hi (person\_first\_name)!  
 You have been requested to volunteer during the following dates. Please confirm by responding below.

Characters : 123

**Important:** Serving assignments will automatically be added to the end of the email. Volunteer will be able to accept/decline each assignment. They will also be granted read-only access to the appropriate service plan.

If possible, would you like the serving request to also be sent via text message? Note, it will not include the email content above.

Yes  No

You can further modify the list of recipients from here. For example, either unchecking or removing those you do not want to notify yet. Clicking on the "edit list" button at the top of the pop up will take you back to the search criteria where you can modify it and update the recipient list based on the results again. Note, that the recipient list can only include those assigned on the plan. You cannot add recipients that aren't scheduled on the plan.

Finally, you can set the subject line and body for the email that will be sent to the volunteers. Their serving assignments will automatically be added to the end of the email where they can then respond to each one.

If text messaging is enabled on the account, you can also indicate whether you also want to send a text message (assuming the volunteer has a mobile number on their profile).

**Important:** a login is not needed to respond to serving requests. They can do this entirely without access to One Church. However, having a login will allow them to view the associated service plan.

Once the requests get sent out, volunteers with a "Not Contacted" status will be changed to have a "Pending" status instead which indicates they were notified.

**Important:** volunteers who have a Pending or Accepted status will be granted read-only access to the service plan. This means they will not only be able to see the order of service (if any) but also who else is scheduled on that plan (pending and accepted assignments only).