

# QUICK START GUIDE FOR TEAM LEADERS



# 4-STEP QUICK START FOR TEAM LEADERS

## Create Account

← Create An Account

First Name

Colby

Last Name

Baker

Email Address

Colby.Baker@caravanstudios.org

## Create Group

admin of groups. So, select one path now and you can create groups or connect to an existing group through your dashboard.

volunteer

create a group

## Invite Volunteers

Your Group Has Been Created

Group Name: **Caravan Studios**  
Your Connection Code: **831652**

You will receive a confirmation email with additional information and instructions for connecting with

## Create Task

 Tasks




Open To Claim

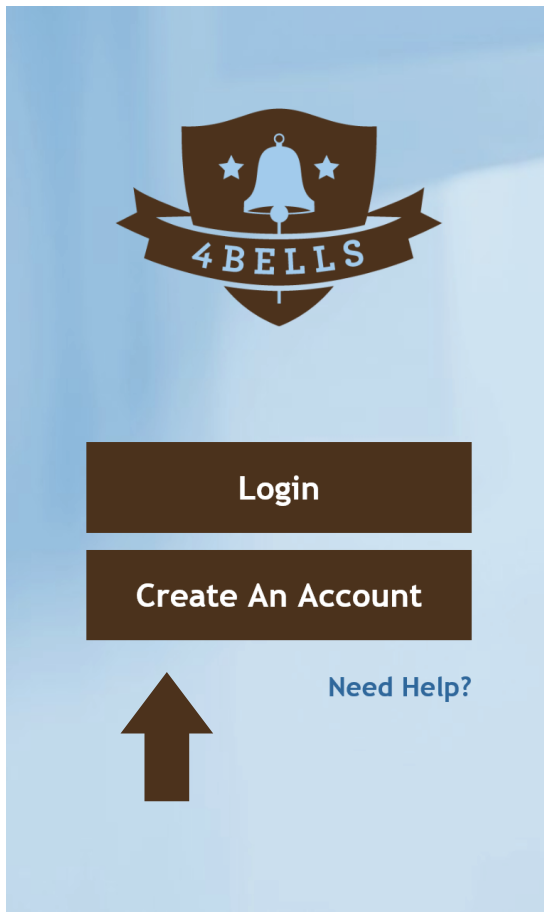
Curre

Add a Task

You hav

Provide first aid @ wildfire  
12/03   
group: SF Emergency Response Team

# 1. CREATE AN ACCOUNT



Create user here

The screenshot shows the "Create An Account" form. The title bar at the top says "Create An Account" with a back arrow. The form has the following fields:

- First Name: Colby
- Last Name: Baker
- Email Address: Colby.Baker@caravanstudios.org
- Mobile Number: 1-415-555-1212
- Password: [masked with dots]
- Password Confirm: [masked with dots]

There are "View Password Rules" links next to the Password and Password Confirm fields. At the bottom, there is a checkbox labeled "Keep me logged in" which is checked.

Continue

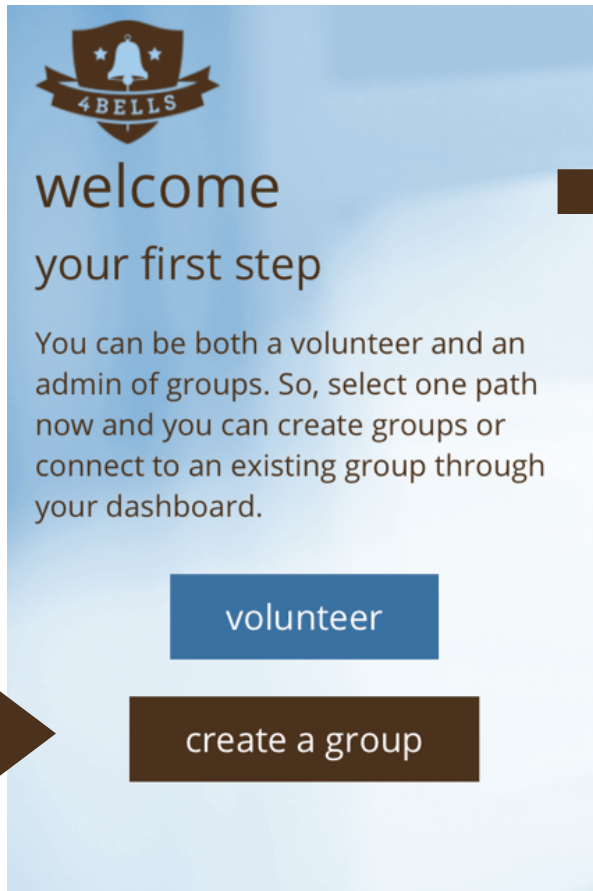
The screenshot shows the "Create An Account" form with the "Keep me logged in" checkbox checked. Below this is the "4Bells Alerts:" section with two options:

- Send me text messages
- Send me notifications

A large dark brown arrow points from the "Keep me logged in" checkbox down to the "4Bells Alerts:" section. Below the alerts is a paragraph: "By using this application, you agree to the [End User License Agreement](#) and [Privacy Policy](#)." At the bottom is a "Continue" button.

Give 4Bells permission to text you.

# 2a. CREATE GROUP



Create group here

The "Create Group" form has a dark blue header with a back arrow and the text "Create Group". The fields are filled with the following information: Group Name: SF Emergency Response Team; Address 1: 435 Brannan St.; Address 2: Address 2; City: San Francisco; Country: United States; Postal Code: 94107; State, Province Or County: (empty). A large dark blue arrow points from the bottom of this form to the right.

Select a recognizable group name

The "Create Group" form continues with the following fields: City: (empty); Country: United States; Postal Code: Postal Code; State, Province Or County: State; Volunteer Approval: Enable approval of volunteers? Yes (with a dropdown arrow). At the bottom is a dark blue "Continue To Categories" button.

Do you need to approve volunteers first?

# 2b. CREATE GROUP

← Group Categories

Create Categories: target tasks and streamline deployment by grouping volunteers by skill or geography. Team Leads can send one task to multiple categories of volunteers and volunteers can be members of multiple categories.

Select or add a new category

New Category Name

Foster Care / Provide Shelter

Other

Physical Labor

Serve

Transport

Volunteer at Office/Shelter

Select or add 3-5 categories, to group your volunteers by skillset or task type

← Add Contacts

Create point people and add their contact information so volunteers know who to contact with questions as they complete their tasks.

Add people who volunteers may contact for more information

← Review

SF Emergency Resp...

Details Categories Co

Address 2

Country United States

City San Francisco

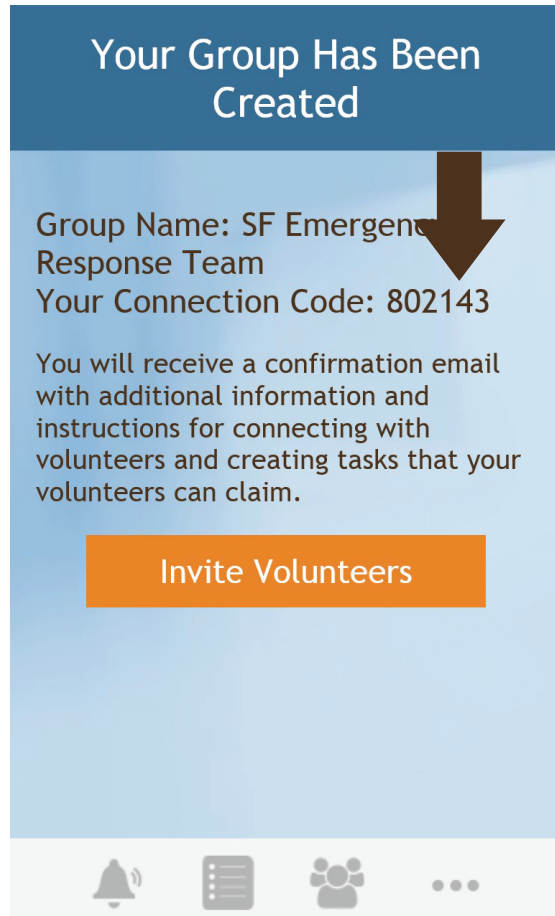
State California

Postal Code 94107

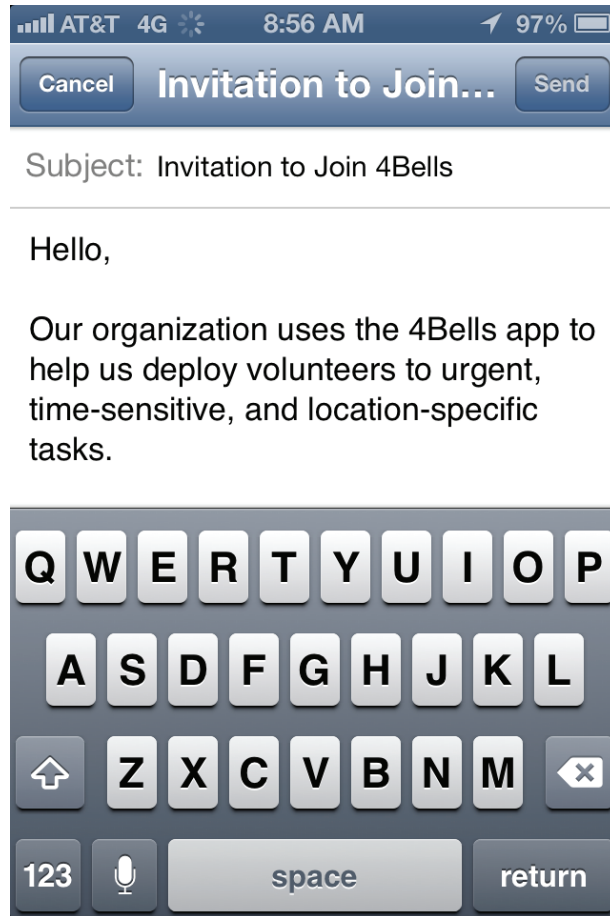
Volunteer Approval yes

Review your group details and continue to save

# 3. INVITE VOLUNTEERS

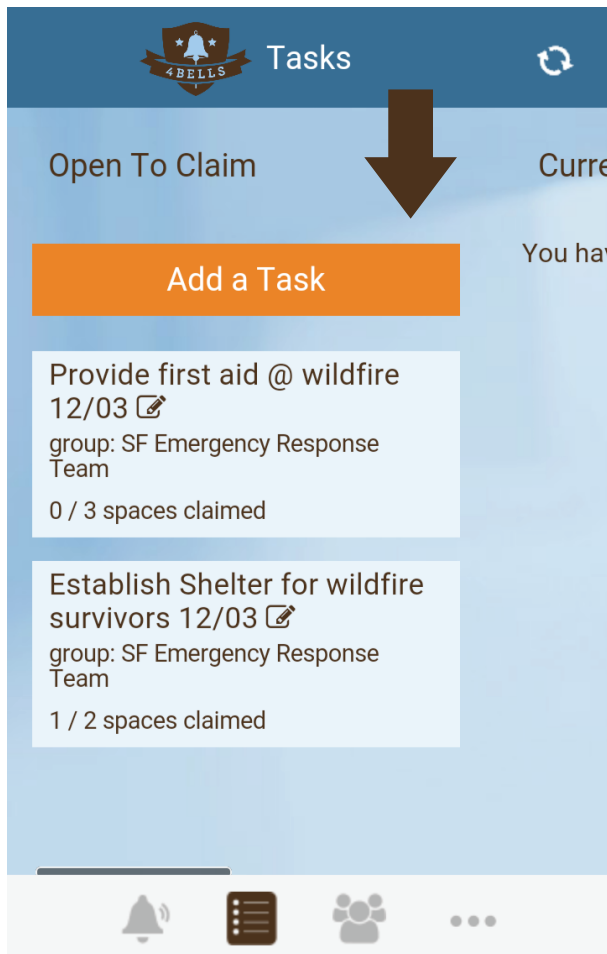


All volunteers will need this code to connect to your group

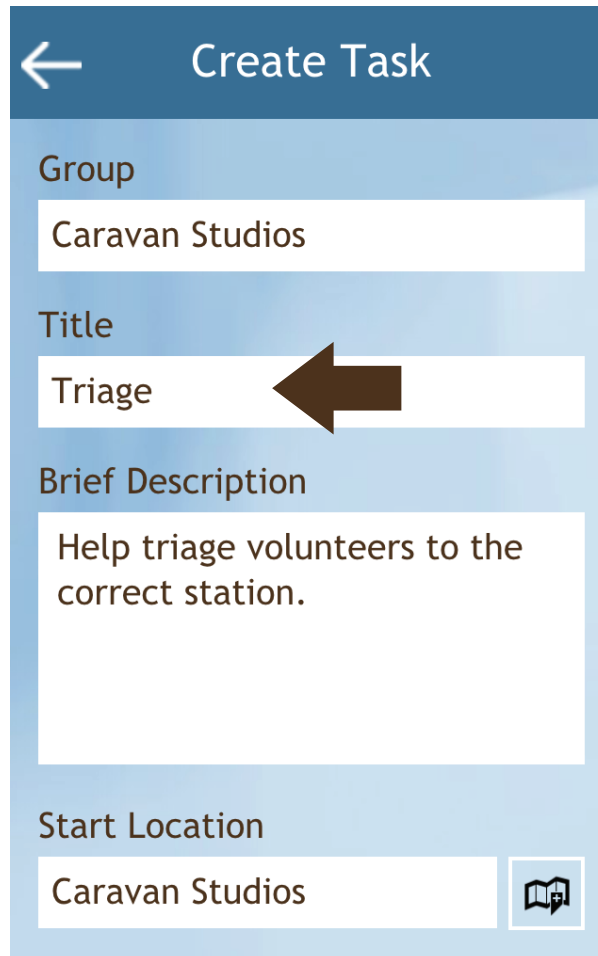


Invite button generates a template to contact your volunteers with the connection code and instructions

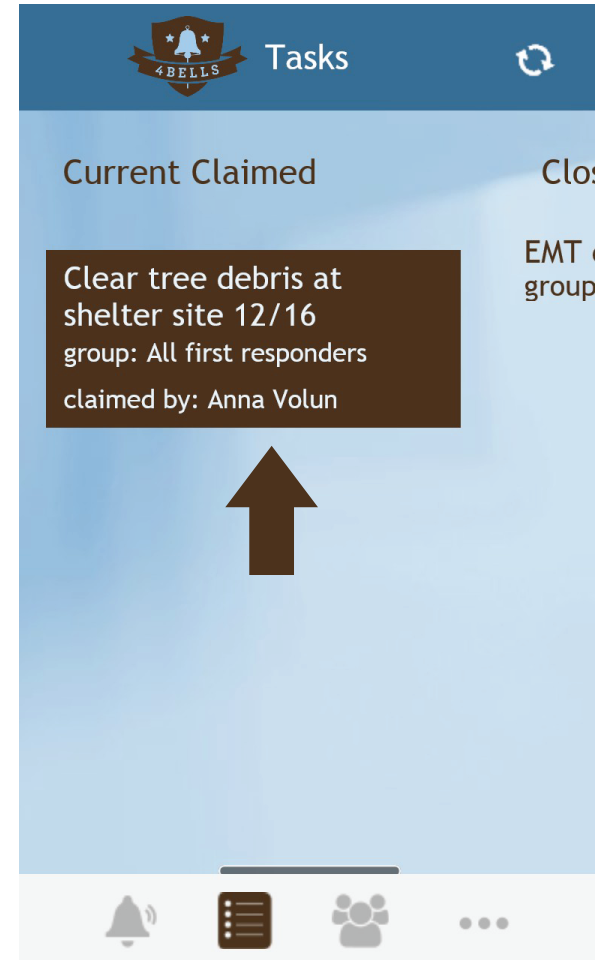
# 4. CREATE TASK



Team leader creates a task and volunteers are notified



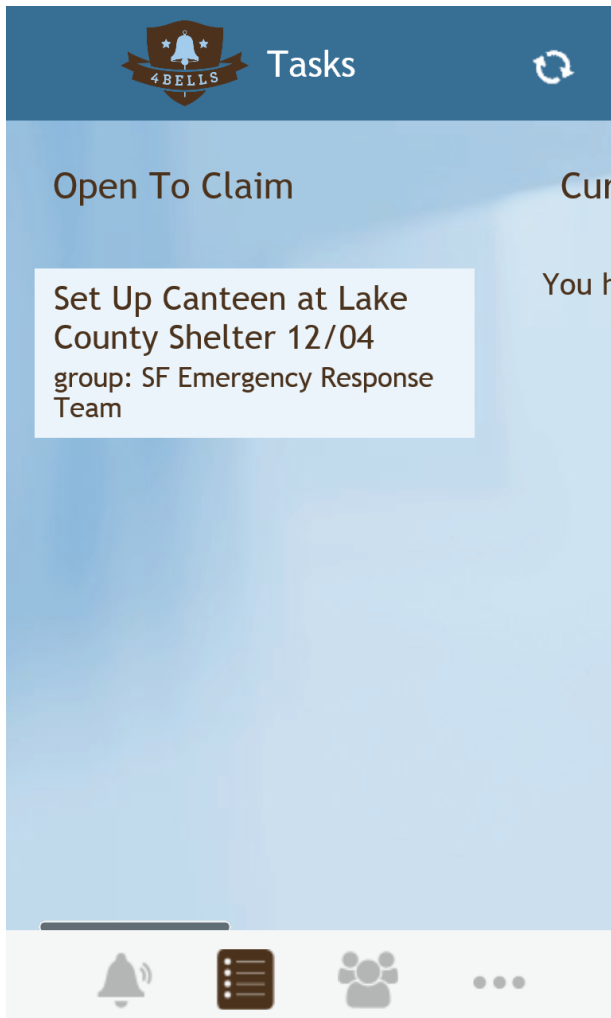
Fill out task detail prompts and continue



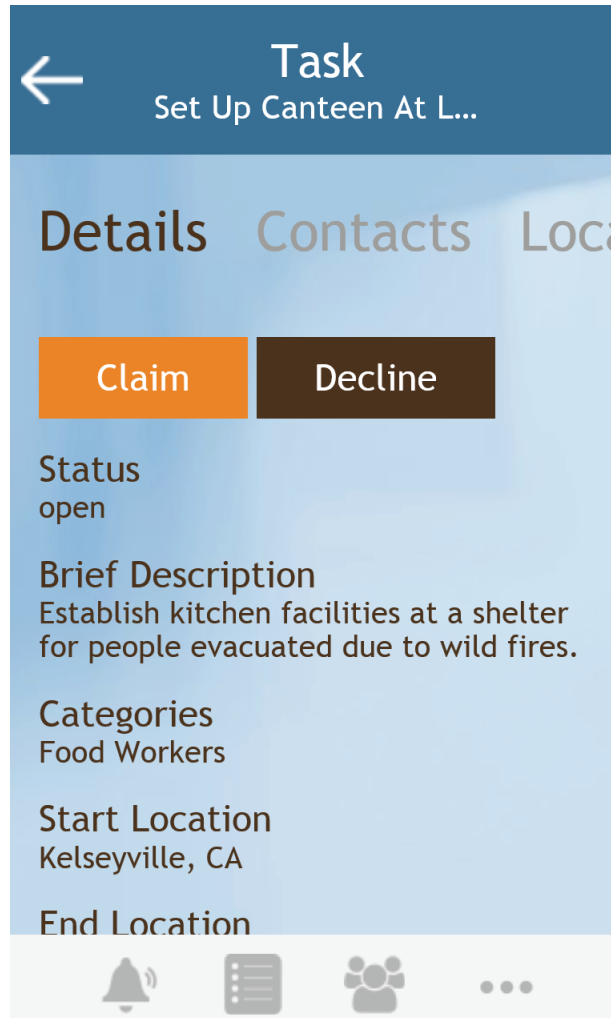
Team leader sees when a volunteer claims a task



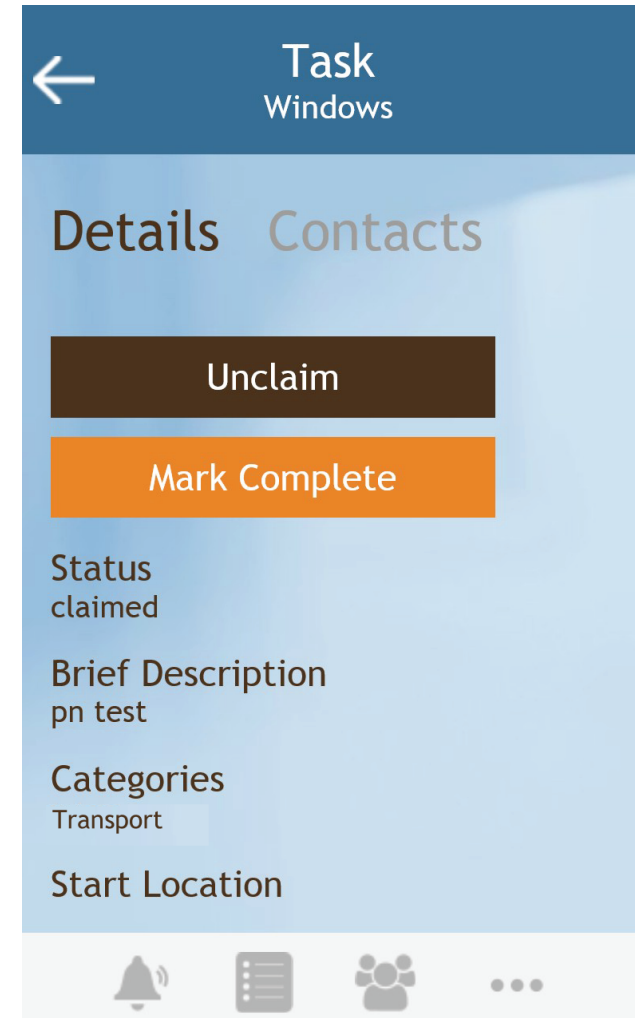
# VOLUNTEER INSTRUCTIONS



Volunteers can tap the task to see more details.



Volunteer reviews details and claims the task



Volunteer marks task complete to notify team leader



# RESOURCES FOR MORE SUPPORT ONLINE

Support Page

<http://support.4bells.org/>