VBS PRO QUICK START GUIDE

This document is intended to introduce you to the VBS PRO event management system by giving you an overview of the logic behind the design. Here's the quick 10-step overview of managing your event in VBS PRO followed by more detail for each of these steps.

10 EASY STEPS TO HOSTING AN EVENT WITH VBS PRO

1. Create a VBS PRO account *(the basic version is free)*
2. Create an event in VBS PRO *(give it a name and set the dates and times, etc.)*
3. Create volunteer job descriptions so volunteers can let you know which jobs they prefer
4. Setup the registration website *(it's easy and you can add as much or little detail as needed)*
5. Setup your participant registration form *(the fields are already set; you decide which to use)*
6. Setup your volunteer registration form *(they can even select the jobs they prefer doing)*
7. When volunteers have registered you can assign them to jobs in the system
8. When kids have registered, you can easily create crews and assign kids and leaders to the crews *(it's easy, just drag-n-drop)*
9. Use the reports feature to create helpful lists to track things like who's enrolled, allergies, assignments and more. You design the reports you need.
10. Use the attendance feature to check-in participants at your event. One click and their attendance is recorded for the day.

STEP 1: CREATE YOUR ACCOUNT

To use VBS PRO you need to create an account. This will be the account you'll use for all your events. As the first-time account creator, you will hold the master account. In addition to your account, you can invite others to become administrators in the system. They'll be able to use all the same functions you do, but only you will have the ability to delete or transfer the master account.

The basic account is free. You can upgrade to VBS PRO Premium at any time. Your premium subscription will last for one year. The Premium version gives you access to additional features like:

- **The ability to host and save multiple events** *(the free version only allows you to maintain one event at a time. You have to delete your past event in order to create a new one.)*
- The **"Auto-build" function** which allows you to automatically assign kids to crews with a few clicks. It even creates new crews on the fly based on the number of kids that are enrolled.
- The **"Copy Event"** feature lets you copy the setup of a past event to use for a new event. This saves tons of time. All the volunteer jobs and their descriptions are carried over along with other settings

STEP 2: CREATE YOUR EVENT IN VBS PRO

When you create a new account for the first time, the system will also walk you through the process of creating a new event. It's an easy process of providing information about your event *(name, dates, times, type of event, etc.)* Once that information is recorded, your event is created and you'll be presented with the user dashboard. The dashboard is where you'll manage most of your event setup and administration.

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to create multiple simultaneous events or copy an existing event to save setup time.

STEP 3: CREATE YOUR VOLUNTEER JOB DESCRIPTIONS

From the dashboard you can choose the tab for **"Manage Volunteers."** This will take you to the volunteer dashboard. Volunteers will be registering on your event website just like participants do. The main difference is volunteers will be registering to do a job at your event so you need to provide them with a list of jobs to choose from.

Choose the **"Create New Job"** link and you'll see a list of jobs that are preloaded in the system. Each job has a setting for number of positions needed. If this setting is zero, the job will not show in the volunteer registration form. All the preloaded jobs are set to zero by default. You can delete any of the jobs you want.

If you click **"Add a new job"** you'll be presented with the job creation form. Just name the job, type a brief description *(brief because the descriptions will show in the registration form and long descriptions get cumbersome when people try to register),* and set how many participants you need.

STEP 4: SET UP YOUR REGISTRATION WEBSITE

On the main dashboard choose **"Manage Event."** This takes you to the events dashboard. At the top of the dashboard you'll see an option to edit your event website. When you click that you'll be at the Event Settings screen. In this screen you'll see several options related to your website. Choose **"Edit Website Content."** This takes you to the screen where you can:

- Create a short description *(in Edit Homepage Description*) that will show up on the main website page.
- Create content for the **"Learn More"** page *(in Edit VBS Details).* This can include photos, video, web links and text descriptions and details of your event.

You can enter as little or as much information as you like. There are formatting tools for the **"Learn More"** content so you can make your information look sharp online. When you're happy with your input, just save the changes and close the Event Settings window.

Back at the Event Settings window, you'll see an option for **"Edit Website Main Image".** Choosing this option lets you upload your own image for the main web page. When you created your event, you should have chosen a template. The templates have their own images by default, but you can replace that image with your own.

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to add up to 3 additional pages to your public event website.

STEP 5: SET UP YOUR PARTICIPANT REGISTRATION FORM

From the Event Settings window, you'll see an option for **"Edit Participant Registration form."** This option takes you to a list of all the fields that are available for your participant registration. You can click the gear icon on the right of a field to access the settings for that field. The settings will let you determine if a field is shown on the registration form and if it is required to be completed. In the participant fields list, you'll see fields related to both parents and children. Whatever fields you choose to show will be what shows on your event website participant registration form. Some fields have special properties. The T-Shirt field has options that let you choose what t-shirt size options to display. There's also a hidden comments field that lets you or your account admins record special notes that are only seen in the report view, not on the public website.

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to add up to 10 additional custom registration fields to your parent and child registration forms.

STEP 6: SET UP YOUR VOLUNTEER REGISTRATION FORM

From the Event Settings window, you'll see an option for **"Edit Volunteer Registration form."** This The volunteer registration screen is also available from the main Event Settings screen. Like the participant registration form options, you control the fields that show in the actual online registration form for volunteers. The jobs field will connect to the jobs that you set up earlier so volunteers can choose from a list of job options to indicate their preferences. This doesn't assign them to that job, but gives you important information when you make your job assignments.

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> to add up to 10 additional custom registration fields to your volunteer registration forms.

STEP 7: ASSIGN YOUR VOLUNTEERS TO JOBS

Once your volunteers have registered online, you can assign them to jobs. From the main dashboard, choose **"Manage Volunteers."** In the volunteer dashboard you will then choose **"Assign Volunteers."** This takes you to the volunteer assignment screen. The process is really simple. There's a list of your volunteers on the left and a list of your jobs on the right. In the volunteer list you can filter the list to show assigned, unassigned, or all. From your unassigned volunteers you will just drag their name from the pane on the left to the job you want to assign them to on the right. You'll definitely want to assign crew leaders and assistant crew leaders because they will be used to create crews later. The other jobs are independent so they can be assigned at any time.

The volunteer's pane on the left will also show you what job preference they selected when they registered. This can help guide your assignment decision. To un-assign someone from a job, just click the trash can icon next to their name. This will move them back to an unassigned status. When you have your volunteers assigned, you can print a listing of all your jobs and who's assigned to each from the same screen.

STEP 8: CREATE CREWS THEN ASSIGN KIDS AND LEADERS TO YOUR CREWS

Click on **"Build Crews"** in the top Menu or under Manage Participants. The Build Crews screen works much like the volunteer assignment process. You simply drag-n-drop participants from the left pane to the crew you want to assign them to on the right.

First you'll need to create crews to assign the kids and leaders to. Click the **"Add Crew"** button at the top. You'll see the crew settings. You can name the crew here and also set what grade level of participant it will accept and set how many kids you can have in the crew. This lets you control who can participate in a crew and how big a crew can be. Just save and add as many more crews as you need.

Once your crews are created, just drag participants from the left pane into crews on the right. If you want to remove a participant from the crew, just click the trash can icon next to their name. This will place them back into the list on the left so they are available to be assigned again.

> **Go Premium!**
> to auto build VBS crews in seconds. Just hit the Auto Build button, answer a couple of questions about crew size and grade levels and VBS PRO builds your crews and assigns kids auto-magically!

STEP 9: USE THE REGISTRATIONS FEATURE

When all your data is in the system, you can use the reports feature to help you manage your event. Go to the **"Registrations"** menu item. The **"Manage Columns"** button takes you to a screen where you can determine what information you want in your report or in the on-screen view.

With the report feature you have the option of exporting the data you want or you can simply print it. The **"All"** checkboxes at the top of the **"Manage Columns"** screen will let you check or uncheck all of the print or export controls in that column. Simply check the boxes next to the fields that you want to include in your report and click save. You will then see a report with the information you decided to include. You can drag the columns left or right to change the order of the columns. You can use the sort arrows at the top of a column to order the information in ascending or descending order. Once you have everything like you need it, just print or export your desired information.

STEP 10: USE THE ATTENDANCE FEATURE

The attendance feature is simply a simple way of checking in your participants or volunteers. Click the attendance menu item. In the attendance screen your participant or volunteer name will be on the left. You can use the sort arrows at the top of the column to arrange the list in ascending or descending order by column. You can also use the search feature to find a specific participant.

To check-in a participant, just click the gray checkbox for the day they are attending. The checkbox will turn green to indicate their attendance status for that day.