

# Creating an Volunteer Occurrence

For "Individually Scheduled" opportunities - the only occurrence you'll need will be automatically created when you use the volunteer opportunity wizard. All connections are tracked in the one occurrence record.

For date and time specific opportunities, the wizard will allow you to create one or more occurrences for each date and time you wish to recruit volunteers for. You can always add additional date and time specific occurrences to an existing date and time specific volunteer opportunity. Here's how:

Navigate to the Volunteer Opportunities Tab.



Choose the Volunteer Opportunity to which you wish to add the occurrence.

**Scroll down to the Occurrences section of the page and click the "New Occurrence" button**



You can also opt to select new occurrence from the Create New Occurrence Link in the Volunteer Opportunity Overview

**Volunteer Opportunity Overview**

Here's your at-a-glance view of this Volunteer Opportunity:

- ✓ Opportunity Created
- ✓ Occurrence Created [Create New Occurrence](#)
- ✓ Recurrence Created [Create New Recurrence](#)

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Total Active Occurrences: 30

Ready to create a new Volunteer Opportunity? If so, [click here](#) to get started.

## There are only a few fields you need to populate to create a new occurrence

Items 1 - 4 below are required. To quickly create an occurrence - just fill out these four fields. Everything else in the record is optional!

### New Occurrence

Required Information

<p><b>1</b> * Volunteer Opportunity</p> <input style="width: 90%;" type="text" value="Search Volunteer Opportunities..."/>	<p>* Start Date &amp; Time</p> <p>Date <input style="width: 80%;" type="text"/> </p> <p>Time <input style="width: 80%;" type="text"/> </p>
<p><b>2</b> * Location</p> <input style="width: 90%;" type="text" value="Search Locations..."/>	<p><b>3</b> * End Date &amp; Time</p> <p>Date <input style="width: 80%;" type="text"/> </p> <p>Time <input style="width: 80%;" type="text"/> </p>
	<p><b>4</b> * Status </p> <p>Pending </p>

*Note: Your page layout may vary depending on whether you have enabled certain advanced features and/or custom fields. But whatever the layout - only these four fields must be populated to create a new occurrence. Everything else will be automatically filled in for you or is optional.*

### The required fields are at the top of this layout.

1. Volunteer Opportunity (required): Put in the name of the volunteer opportunity (if you used the related list button this may be automatically filled in for you). Use the lookup icon to select the correct volunteer opportunity name.
2. Location (required): Use the lookup to find the location of this occurrence. (If the location isn't already created, you'll need to create a location record first in the locations tab)
3. Start Date & Time / End Date & Time must be filled in. (In classic, this is one field for date and time and it should be formatted as shown on the right of field. (click on the field to popup a calendar and choose the date.

4. Status (Required): Choose a Status from the picklist.

- Active means it will be on public website (once volunteer opportunity is published)
- Pending means you've created the occurrence but don't want it to show up on the website, YET
- Awaiting Approval means it was added by a partner, and you have to approve it to publish this new occurrence
- Admin is for occurrences you never mean to have show up on the public site
- Inactive (means it has been archived or retired -- never meant to show up on the site again)
- Canceled means the occurrence HAD been active, but has since been canceled.

All the other fields in the occurrence record can be left blank if you want the default information from the volunteer opportunity to be automatically filled in for you. OR - you can choose to manually enter different information for Opportunity Coordinator, Min and Max Attendance, Registration cutoff and start date, etc. (See below)

But at this point - you can click Save and your occurrence will be published IF the occurrence is saved in ACTIVE status, and the volunteer opportunity is already active.

## After clicking SAVE

The screenshot displays the 'DETAILS' tab of an occurrence record. At the top, there are tabs for 'DETAILS' and 'RELATED'. Below this is a section for 'HandsOn Connect Shortcuts'. The main content area is titled 'Occurrence Overview' and includes a summary of the occurrence, a checklist of completion status (Occurrence Published: Active, Verifications Complete: No), and a link to create a new occurrence. Below this is the 'Required Information' section, which lists the Volunteer Opportunity ('Arts and Crafts for Kids'), Location ('Riverside Public Library'), Start Date & Time ('12/28/2018 7:00 PM'), End Date & Time ('12/28/2018 8:30 PM'), and Status ('Active'). The 'Occurrence Schedule and Status' section shows the Schedule Type ('Date & Time Specific'), Registration Type ('Sign Up'), Posting Status ('This is approved and published for volunteers to sign-up.'), and Recurrence ('RE-000092'). A red arrow points from the 'Date & Time Specific' field to the 'Posting Status' field.

Note that the posting status was updated automatically. You can now edit the record if you wish to change any of the defaults.

Here is a complete list of other sections and fields in the occurrence record that may or may not appear in your page layout. They are not required but enable additional customization to your occurrence if used.

# Occurrence Schedule and Status, Coordinator Information and Registration Information

Occurrence Schedule and Status

Posting Status

Recurrence  
Search Recurrences...

Posting Status: (leave this blank. It will automatically be populated for you based on the status of the occurrence and the volunteer opportunity)

Recurrence: (leave this blank. It will automatically be populated whenever an occurrence is created as part of a recurrence.

The next two sections can be left blank, and the default information from the Volunteer Opportunity will be brought over when the record is saved. If you wish to use values other than the default values for these fields, you can populate them as desired.

Coordinator information (leave blank to auto-populate default values)

Opportunity Coordinator  
Search Contacts...

Opportunity Coordinator Email

Registration Information (leave blank to auto-populate default values)

Minimum Attendance

Maximum Attendance

Registration cutoff (hours)

You can now SAVE your occurrence. Once the new occurrence has been saved you can review and publish your occurrence if its not been created in Active Status.

## EMAIL MANAGEMENT FOR THIS OCCURRENCE:

The first column of options suppresses one or more of the automated emails sent to volunteers for this occurrence.

The second column of options suppresses one or more of the automated emails sent to opportunity coordinators for this occurrence.

See this article for additional information on these emails:

∨ Email Management for this Occurrence

Do NOT Send confirmation Email ⓘ



Do NOT Send reminder Email ⓘ



Do NOT Send post Opportunity Email ⓘ



Do NOT Send email of Vol. in Waitlist ⓘ

Do NOT Send email of Volunteer Signups ⓘ

Do NOT Send email of Volunteer Removals ⓘ