

orgACTION

member management made easy

OrgAction's Volunteer Management service

- Automates volunteer registration & scheduling
- Generates greater volunteer buy in
- Frees staff from mundane clerical tasks
- Includes real-time and historical reporting
- Makes volunteer tracking and reporting easy
- Includes a customizable database
- Outstanding support

And most importantly...

- Is simple, powerful, and easy to use

Simplify Organizational Challenges

Executives struggling to track multi-tiered organizations now have a reliable way to link fieldwork with the central office. OrgAction provides a secure platform that gathers, tracks, and analyzes volunteer information. Data customized to your needs is available in real time and can be easily reported upon.

Registration Is Faster

Our enrollment page allows potential volunteers to select their program during the registration process. OrgAction tailors the data volunteers are required to provide and can, in some cases, automatically grant access to selected events.

An Umbrella for Multi-Orgs

OrgAction's Multi-Org feature allows larger, distributed organizations to make sense of the data their child regions are collecting through consistent processing of volunteer information. The local organization still gets the autonomy they need to plan events and manage volunteers. At the same time, central management gets the most complete organizational picture ever realized. All information is stored in a common format to make it easy to compare regions or departments and meet various reporting requirements.

Document Sharing

OrgAction's document sharing is customizable and can fit a variety of needs. Documents are kept secure and access is only granted to personnel you authorize.

Connection Enhancement

Members and administrators can post information, send messages, and even link up via Facebook integration.

Core Features

- ❖ Optional volunteer self-registration
- ❖ Enrollments – Customize what events and forms a volunteer fills out by their enrollments. The first enrollment is chosen when they register.
- ❖ Custom Forms – Most commonly used to create a volunteer application form but can also be used to create a database for tracking anything else associated to a person.
- ❖ Event registration – Administrators create events that are available to all, or only a subset of volunteers. The system tracks all time and ensures only the designated number of people can register.
- ❖ Reporting – Standard reports are available for reporting volunteer and schedule information. Custom reports can be developed for a fee.
- ❖ Outstanding support – OrgAction clients receive personal setup, training, and general support to make sure they are getting the most out of OrgAction's services.

System Screenshots

The screenshots below show just one possible configuration from the volunteers perspective. The available enrollments and form questions are all configurable.



Welcome to the OrgAction Enterprise Demo. Here you can customize the message shown to volunteers and members before they sign in and register. You can include whatever content you desire.

Please select an enrollment below to create an account.

Login
User Name
Password

[Forgot Password](#)

Register - Select your primary interest from the list below

Youth Volunteers
Adult Volunteers
Some other program



Outstanding Volunteer Management
starts with OrgAction's personalized services

1: Login page with 3 sample enrollment types

Create Account
Please create an account to get started.

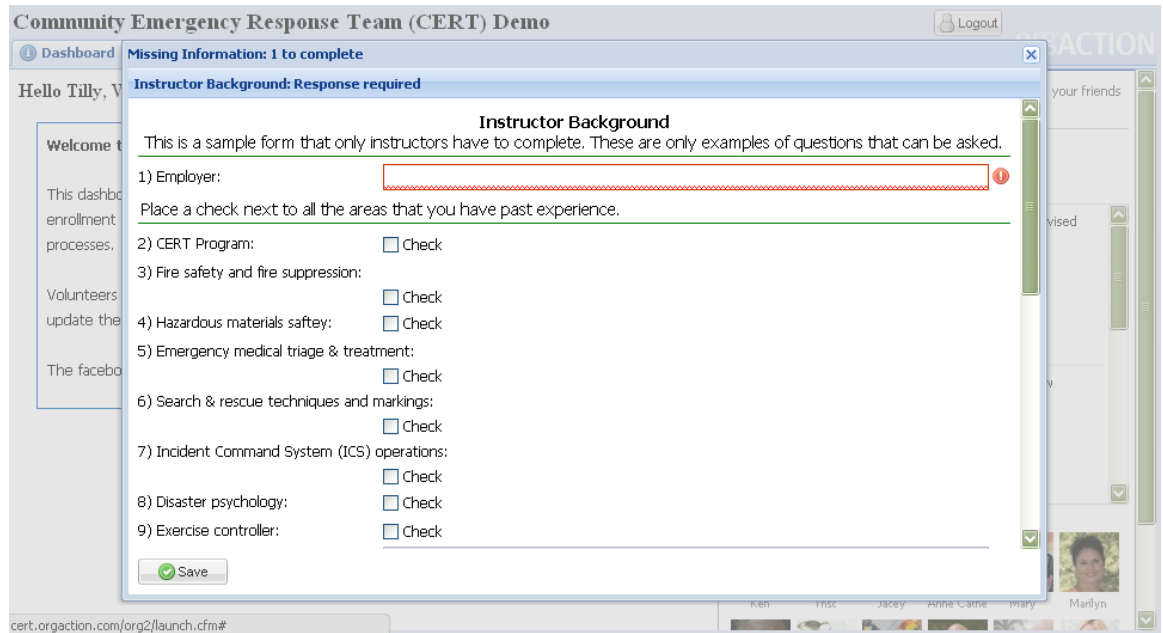
Basic Information
Title:
First Name:
Middle Name:
Last Name:
Email:
 Allow email contact

User Name
User Name:
password:

Phone Numbers
Primary: SMS
Secondary: SMS
SMS: Check to allow OrgAction to send SMS text messages to your phone. You will be responsible for related phone charges.

United States Address
Address Line 1:
Address Line 2:
City:
State:
Zip Code:
Country:

2: Create account – Collect basic volunteer information like name and address



3: Sample required custom form for a particular enrollment type, you can have multiple forms and each form can have multiple questions. Forms can be required, optional, or available only to administrators.



4: Sample Dashboard - includes area for posting news. Optionally include news feed from a facebook page.

Community Emergency Response Team (CERT) Demo Logout

Dashboard My Information Documents Administration Help & About

Training: CERT - FBO (9508)

Training: CERT - FBO

- The schedule is frozen 1 day before the event.
- Alerts will be sent to the administrator for changes made within 3 days of the event.

Training sessions for FBO. This area can include links to [maps](#) or any other information you want to share with volunteers.

Calendar **Matrix**

Activity	Fri 01/28/2011	Sat 01/29/2011	Fri 02/04/2011	Sat 02/05/2011	Fri 02/11/2011	Sat 02/12/2011	Fri 02/18/2011	Sa 02/19/2011
Morning Class 08:00 am - 11:00 am								
Afternoon Class 01:00 pm - 05:00 pm								
Night Class 06:00 pm - 09:00 pm								

5: Sign up for an event- Matrix view

Community Emergency Response Team (CERT) Demo Logout

Dashboard My Information Documents Administration Help & About

Training: CERT - FBO (9508)

Training: CERT - FBO

- The schedule is frozen 1 day before the event.
- Alerts will be sent to the administrator for changes made within 3 days of the event.

Training sessions for FBO. This area can include links to [maps](#) or any other information you want to share with volunteers.

Calendar Matrix

January, 2011								
Previous	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Next
							1	
	2	3	4	5	6			8
	9	10	11	12	13	Available	Available	15

6: Sign up for an event- Calendar view

Community Emergency Response Team (CERT) Demo Logout

Dashboard My Information Documents Administration Help & About **New Report**

Run/Update Report
Download Report

Name, email, and address							Training Preferences
Member ID	Acti...	First Name	Last Name	Email	Phone	Preferred meeting time - CE...	
25976	Y	Daniel	Moore	dmoore@orgaction.com		Saturday Mornings	
26287	Y	Dan	Moore	dmoore@orgaction.com			
26724	Y	Billy	Bob	bb@example.com		Saturday Mornings	
26725	Y	Tilly	Tad	ttad@example.com	512-123-1234		

cert.orgaction.com/org2/launch.cfm# 1 of 1 Download Displaying results 1 - 4 of 4

7: Report Builder- View data from custom forms. Supports joins, filtering, sorting, and downloads to Excel.

Community Emergency Response Team (CERT) Demo Logout

Dashboard My Information Documents Administration Help & About

Send Mail

Email Center

To: All Active Members Send

4 matches found.
"Billy Bob" <bb@example.com>, "Dan Moore" <dmoore@orgaction.com>, "Daniel Moore" <dmoore@orgaction.com>, "Tilly Tad" <tad@example.com>

From: "Daniel Moore" <dmoore@orgaction.com>

Subject:

Dear [FIRST_NAME] [LAST_NAME],
...Message...
Sincerely,

8: Email Center – Send messages to every one, event registrants, or group members.

Conclusion

The preceding screenshots are examples of one possible configuration. OrgAction's implementation team meets with each client to prepare the service to his or her exact requirements.

Contact us

Online: www.orgaction.com
 Email: info@orgaction.com
 Phone: 512.850.5346

