

Servus Bonus user guide

A practical guide for setting up volunteers, events, roles, and schedules.

Getting started

1. 1

Add your volunteers

Enter volunteers individually or import your list. Date of birth is optional and is used only for minor-protection features.

2. 2

Create an event

An event is a recurring activity that needs volunteers, such as a service, meeting, or community program.

3. 3

Define the roles

Roles describe what volunteers do at an event, such as reader, greeter, or musician.

4. 4

Create a draft schedule

For a standard Assigned Event, choose one, two, or three consecutive months. Each successfully created month remains a separate draft for review.

5. 5

Confirm the schedule

Review and adjust each draft before confirming. Volunteers are notified only after confirmation; an untouched draft automatically confirms within one to two days.

Core concepts

Event

An activity with dates and times that needs volunteer coverage.

Role

A responsibility that a volunteer can perform during an event.

Change request

A volunteer request to add, remove, or change an assignment.

Family

A protected connection between a minor volunteer and their responsible adult.

Rotation

Dedicated teams that take turns covering recurring sessions.

Get help

Open Help from the main menu or contact support@servusbonus.com when you need assistance.

Deep dive

Open a topic when you need more detail about an owner workflow.

Add and organize volunteers

Start with accurate volunteer records, then connect each person to the work they are eligible to perform.

- **Add one volunteer:** Use individual entry when you need to review or complete one person's information carefully.
- **Add many volunteers:** Use the bulk workflow when you already have a list and want to build your roster more quickly. Review the results before scheduling.
- **Date of birth:** This field is optional. When provided, it enables the protections that apply to volunteers under 18.
- **Eligibility:** Assign volunteers to the appropriate events, roles, and groups so the scheduling tools know where each person can serve.

Choose the right staffing approach

The best workflow depends on whether you assign individuals, let volunteers claim openings, or schedule established teams.

- **Assigned Event:** Use this for activities where Servus Bonus should build a draft from eligible volunteers. This works well for recurring services and programs.
- **Sign-up Event:** Use this for a one-time opportunity where volunteers claim open slots on a first-come, first-served basis. This requires Pro or Premium.
- **Rotation:** Use this when fixed teams take turns covering sessions. The rotation tracks recent workload and helps you choose the next team. This requires Pro or Premium.

Build events and roles

Events describe where and when people serve. Roles describe what they do while they are there.

- **Create the event:** Set a clear name, timing, and recurrence that match the real activity. Sign-up Events are intended for one-time opportunities.
- **Define the roles:** Create each responsibility that must be covered, such as greeter, reader, driver, or musician.
- **Connect roles and volunteers:** Make sure every role has enough eligible volunteers before creating a schedule. Missing eligibility leads to open or difficult-to-fill slots.

Build balanced teams with Team Rules

Team Rules let you require or prefer that a scheduled team include volunteers with a specific label, on top of normal eligibility. This requires Pro or Premium.

- **Create a volunteer label:** A label describes who a volunteer is or what they can do — for example, Experienced or Driver. Choose which active volunteers hold each label. You can change this list at any time.
- **Create a team rule:** A rule tells the scheduler how labeled volunteers should be placed on teams, for example: every team should have at least 1 Experienced volunteer. You can limit a rule to one event or one role instead of applying it everywhere.
- **Must-have or Nice-to-have:** Mark each rule Must-have or Nice-to-have. The scheduler treats Must-have rules as its first priority and only improves Nice-to-have rules afterward.
- **When there are not enough eligible volunteers:** A Must-have rule never blocks a schedule from being created. If a team on a specific date genuinely cannot meet a Must-have rule —

for example, because too few active volunteers currently hold the required label, or the ones who do are already assigned elsewhere or unavailable that day — Servus Bonus quietly restores that one role-and-date team to the assignment it would have received without the rule, and the rest of the schedule continues to generate normally. No other team is affected, and nothing you were doing is interrupted. You receive a separate email listing exactly which team or teams could not fully meet a Must-have rule, so you can review and reassign manually, add more volunteers with that label, or adjust the rule if it is no longer realistic. A Nice-to-have rule behaves the same way, except it only shows as unmet on the schedule results screen — no email is sent.

- **Find it:** Open your account menu and choose Team Rules under Create. This requires Pro or Premium.

Create, review, and confirm a schedule

Standard Assigned Events can generate up to three consecutive monthly drafts in one action. Every created month remains separately reviewable.

- **Choose the number of months:** From Staff an Event, choose one, two, or three consecutive months before generating a standard Assigned Event schedule. Each month counts as its own schedule.
- **Read the result:** The result identifies every month that was created. If a plan limit or scheduling window stops the batch, schedules already created remain available and later months are shown as pending.
- **Review the draft:** Check open slots, availability conflicts, repeated assignments, and any other warnings before publishing. Volunteers cannot see a draft schedule.
- **Make adjustments:** Change individual assignments directly while the schedule is still a draft. You do not need to rerun the schedule to correct it.
- **Confirm deliberately:** Confirm when the draft is ready. Otherwise, a draft at least 24 hours old auto-confirms during the next daily sweep, usually within one to two days.

Understand schedule emails and duty reminders

Schedule publication notices and upcoming-duty reminders are separate messages, and both are batched to reduce unnecessary email.

- **After confirmation:** Volunteer assignment emails are queued only after a schedule is confirmed. The notification sweep runs every two hours and can combine several newly confirmed schedules into one email per volunteer.

- **Before a duty:** When a duty is 24 to 30 hours away, it triggers one reminder digest. That digest also includes the volunteer's other not-yet-reminded duties occurring within the next 48 hours.
- **What is included:** Reminders cover occupied slots on confirmed schedules and assigned or claimed rotation sessions. Each eligible duty is included only once.
- **Language and time:** The digest uses the volunteer's preferred language and timezone when available, with the organization's timezone as the fallback.
- **Notification controls:** In Settings, use Send notifications to volunteers to pause email, push, and text while testing. Turn it back on before confirming: paused messages are not sent later. Messages for minors go to the responsible family head.

Handle availability and changes

Schedules continue to need attention after they are confirmed. Use the related tools to keep the roster accurate.

- **Availability:** Volunteer block dates help prevent assignments when someone has said they are unavailable.
- **Substitutes:** A scheduled volunteer can request a substitute when they cannot cover an assignment. Track the request until another eligible volunteer accepts it.
- **Petitions:** Petitions let volunteers ask to join or leave eligible roles, events, or groups. Owners and authorized administrators review these requests.
- **Cancellations and edits:** Review affected assignments and notifications whenever an event, session, or schedule changes.

Protect minors and organize families

Servus Bonus applies additional safeguards when a volunteer's date of birth shows that they are under 18.

- **Responsible adult:** Connect the minor to the appropriate family head so communications and account oversight go to the responsible adult.
- **Communication:** External notifications for a minor are routed through the family head rather than directly to the minor.
- **Scheduling restrictions:** Some self-service and assignment actions are unavailable until the required family connection is in place.

When a volunteer or owner leaves

Use the appropriate offboarding path so access is removed without damaging schedule history or organizational records.

- **Deactivate a volunteer:** Deactivation blocks access while preserving the volunteer's historical assignments. Reactivate the account if the person returns.
- **Anonymize when necessary:** Anonymization removes the volunteer's identifying information while retaining non-identifying schedule history.
- **Delete an owner account:** An active subscription must be resolved first. Organization deletion begins a 30-day recovery period before permanent deletion.
- **Need assistance:** Contact support before proceeding when you are unsure which offboarding action is appropriate.