

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

Generate a draft and edit any assignments that need attention. Draft schedules are not visible to volunteers.

5. 5

Confirm the schedule

Confirm only after reviewing the assignments. Confirmation makes the schedule available and notifies volunteers.

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.

Create, review, and confirm a schedule

Treat the generated schedule as a draft until you have reviewed every assignment and warning.

- **Start from Staff an Event:** Choose the staffing approach that matches the activity, then provide the dates and options required by that workflow.
- **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:** Confirmation makes the schedule available to volunteers and sends the configured notifications. Confirm only when the draft is ready.

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.