



## Easter Scheduling Webinar Notes

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### Contact Us

Your MSP license comes with unlimited support, and we're happy to help!

*From the Help menu:*

Send Data Files to Tech Support

[support@ministryschedulerpro.com](mailto:support@ministryschedulerpro.com)

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## Creating Special Services

Go to the **Service Times** pane BEFORE you create your schedule to review or create your special services.

Do I need to use Special Services?

- Are there significant changes to my service times or ministry requirements?
- Do I want to use my special service preferences/settings?

Yes: Consider special services

No: Consider using normal, weekly services

Creating a new yearly service:

1. Click New Yearly button
2. Add the service name, date, time, and number of volunteers needed
3. Check "Remind me to change the date for this service every year" if the date of the service changes, like Easter, Good Friday, or Ash Wednesday

**Pro tip:** If you already created your schedule, open the schedule and leave it open in the background as you make changes to the Service Times pane. This will then ask you if you want to apply the changes to your open schedule.

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## Scheduling Special Services

After you create your Yearly Services in the Service Times, then head over to the **Schedules** pane to start generating the schedule. (Do this AFTER emailing volunteers to gather availability).

1. Put in start and end dates
  - a. We recommend having Feb schedule go through at least April 4th this year!
  - b. Patti's quarterly scheduling tip-
    - Feb-Apr: includes Ash Weds and Easter every year
    - May-July: provides a good transition into summer
    - Aug-Oct: start of new school/ministry year
    - Nov-Jan: covers all holidays and no need to create a new schedule mid-Dec
2. Click "Create"
3. Choose to:
  - a. *Create BOTH the yearly and the weekly services on this date* if you have not replaced all of your services on that date with yearly services
  - b. *Create ONLY the yearly services on this date* if your regular services are not needed
    - i. Treat yearly services as *weekly* if you want to use volunteer's normal, weekly service preferences
    - ii. Treat yearly services as *yearly* If you want to have volunteers choose which special services they attend

### Who Will be Scheduled?

Weekly preferences: schedules preassignments and rotating teams, and looks for volunteers who prefer to serve at that specific weekly service

Yearly preferences: DOES NOT add weekly preassignments, skips rotating teams, and schedules volunteers via their special service preferences (see below)

## Special Service Preferences

Applies to all yearly and one-time-only services. Options here control both the auto-scheduler and what displays in the app.

1. Open any schedule
2. Go to the Schedule menu
3. Click on Scheduler Settings
4. Look at the Special Services options (last)
  - a. *Schedule any volunteer for any special service (regardless of his or her service preferences) is best when using self-sign-up*
  - b. *Schedule only volunteers for a special service who have the service (or [Any special service]) explicitly declared as one of their service time preferences is best when asking volunteers to indicate which service they prefer and then using manual or auto-scheduling*
  - c. Pro tip: auto-schedule using the 2nd setting, then switch back to the first to fill any remaining positions with self-sign-up!

## Manually Adding a Special Service

1. Open the schedule
2. Select the date where you want to add your service
3. Click the “New Service” button, which will create a one-time-only service
  - a. Great for events that do not occur every year, like weddings and funerals
  - b. Use the “treat as” to determine who is qualified to serve at this service
4. Click *Don't fill in this service when the auto scheduler is run* if you do not want to run the auto-scheduler on this service yet
5. Click *Overload volunteer's schedules for this service if necessary* if we want the best chance at getting our service filled

## Making the Schedule Live, Creating Live Schedule Posts

*Making your schedule live* allows volunteers to see the available positions and any services they have been scheduled for online in the My Schedules tab in the Web Terminal and on the app.

*Live Schedule posts* are customized views of the schedule and control what volunteers see in the Full Schedules tab of the Web Terminal.

1. Save your schedule by going to the schedule and choosing **File - Save**
2. If you are ready for your volunteers to see it, you can check “make schedule live” and access your Live Schedule Post options from here.

- a. Pro tip: If you save a schedule without making it live and have designated Ministry Leaders - they'll be able to see the schedule before volunteers are able to and manually edit assignments!
  3. If you did not make your schedule live when you saved it, go to **File** - *Make schedule live*. This will prompt you to create or clone your Live Schedule Posts.
  4. To add an additional Live Schedule Post, go to **File** - *Create additional Live Schedule Post*
    - a. Choose your format (we love *list of services* or *interactive calendar* for the Easter schedule)
    - b. Use the **Included Services** to choose your yearly services or the date range
    - c. Live Schedule Posts can be viewed island managed in the **Web Terminal** pane under the *Full Schedules* tab
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## Connecting with Volunteers

### Using Preconfigured Templates

1. Go to the **Announcements** tab
2. Click on *Use Template* and then *Preconfigured* (our example is the Request Updates to Availability email)
3. Adjust the email to your liking

### Link to Your Live Schedule Post With Tokens

1. Click the Token button on the right
2. Click on the Live Schedule Post links category
3. Select the desired Live Schedule Post token

### Previewing and Sending

Before you can send your email, you must click the Preview button.

In preview mode, you may click on the name of any volunteer to see what the email will look like when they receive it.

Click Send when you are satisfied with your email.

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## Best Practices for Special Services

1. Create Yearly Services

2. Capture Availability
3. Create Schedule
4. Email the schedule