Ministry Scheduler Pro

Creating Your Next Schedule Checklist

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- ☐ Email Your Volunteers for Updates
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- ☐ Create Schedule
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Email Your Volunteer for Updates

MSP includes preconfigured email templates that help you communicate with volunteers throughout the entire scheduling cycle. Using the "**Request for updates to availability**" template, you can quickly alert volunteers of the new scheduling period and confirm their preferences and availability before running the next schedule.

How to use Preconfigured Templates

1. Start in the Emailer pane of MSP.
2. Then click on the Settings... button along the top.
3. From the preconfigured templates menu, select the template.
4. Click on the Preview... button along the top of the Emailer.
5. Set the Next Schedule Cutoff Date, and the Next Schedule Start & End Date.
6. Click OK to preview the email. Once you are happy with how it looks, use the Send button to send it along to your volunteers.

(Optional) Remind volunteers to update

Using the "**Request for updates to availability (reminder)**" template, you can email all of the volunteers who have not yet responded by updating their profile.

Make Sure Service Times Are Up to Date

Start by checking your service times to make sure they reflect your current needs. Ensure any yearly services have the correct dates and times and that the number of volunteer positions looks right for each service. While you can make manual adjustments to your schedule, best practice is to make sure these are as up to date as possible *before* creating the new schedule.

If you are using either **Preassignments** or rotating **Teams**, you may want to check and make sure that these assignments are up to date, as rotating assignments are placed on the schedule as soon as they are created. If you aren't using either of these features but are interested in learning more, you can check out the rotational scheduling video on the resources page of our website:

Team Scheduling (Video)

Preassignments (Video)

Create Schedule

1. Select the beginning and end date for your schedule.
2. Click on the Create button to generate the schedule "skeleton."
3. Make any manual assignments you'd like before running the auto-scheduler.
4. Assuming you have reached the "cutoff date" and received all of your volunteers' updates to availability, use the Commence Scheduling button to run the auto-scheduler.

If at any point you want to save the schedule and come back to it:

1. Go to the File menu along the top of the schedule and click Save...
2. Make sure the "Make this schedule live now..." box in *unchecked.*
3. Then click OK to save.

When ready to share with volunteers, you can then make the schedule live by going back to the File menu or using the button located in the Schedules pane.

Email Volunteers When the Schedule Has Been Finalized

Once you've made your schedule live, you'll want to let your volunteers know when they are scheduled. To do this, you can send out the Preconfigured Template "**Schedule Finalized**" in the Emailer section of MSP.

Need further assistance?
Contact us at
support@ministryschedulerpro.com

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