

Quick Guide to use Track-it-Forward

Hello Zontians,

Many of you have expressed the need for a training session on how to use and navigate **Track-it Forward**. I put together a quick guide that hopefully will help get you started so we may utilize, and streamline our services, as well as; communications with each other.

All Mid-Maryland Zontians have the same access to use the system.

Getting Started

You can log into Track-it Forward one of two ways. Either through the website our wonderful Public Relations/Social Media Committee designed for us.

1. Go to our website: **zontaclubofmid-maryland.org**
2. Login: **Username: ZontaMM Password: Charter2016** (*username and password are case sensitive*)
3. Goto: Members Only (*right side of page*)
4. Hover mouse over “Members Only” then click on Google Drive.
5. Second page appears with a link to Google Drive (*on this page the google login and password are at the bottom of the paragraph for Google Gmail*)
6. Click on the underlined words Google Drive
7. Log in using the login and password provided

OR

1. Go to: www.trackitforward.com
2. Click sign in.
3. Username: **Your personal email address Zonta Mid-Maryland has on file** – Password: **Your unique password you created or need to create**

Navigating the System

1. **Logging in Hours** – This enables you to log your volunteer hours for a variety of activities
 - a) Enter the # of hours you provided volunteer service
 - b) Choose the date you provided volunteer service hours

- c) Choose an activity you provided volunteer services hours from the drop down menu
 - d) Add notes (This is optional)
 - e) Click “submit time”.
2. **Event Sign-ups** – This enables you to sign up for **OR** create a new event
- a) Click on “Event Sign-ups” on the top of the page
 - b) If you see an event already created that you are interested in and have not been notified of, click on the event title and choose sign up.
 - c) Once you’ve click on the “sign up” button a box will appear and give you the option to send a personal message to the organizer. *(This will email the organizer of that particular event you are volunteering to participate*
3. **Creating a New Event** – This enables you to create a new event you are organizing
- a) Click on **Organizers Dashboard** – located directly under heading of the page “Zonta Club of Mid-Maryland”
 - b) Click on Settings *(top mid right of screen)*
 - c) Mid way on this page you will see “**List some of the categories below, one per line**”
 - d) Scroll all the way to the bottom of that section
 - e) Input the name/title of your activity/project you wish to create
 - f) Once added in you will see on the left side of the screen under “Volunteer Log Preview” a moving wheel which indicates your activity name has been saved. **Note: you can test this by clicking on the activity drop down and make sure your new activity has saved and appears the way you want all to see**
 - g) Once you created the new activity go back to account (located upper right side of screen) and click- this brings you to the main page.

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- h) Click on log hours button
- i) Click on Event Sign-ups (*upper right top side of screen*)
- j) Click on Event Sign-up sheet (*orange button*)
- k) Enter an event title (*This will appear in the subject line of emailed volunteers*)
- l) Enter the date of the event
- m) Write a description of the event you are requesting volunteers services for
- n) Choose a shift or shifts if necessary
- o) Choose the number of volunteers needed (*Only if you need to be specific - optional*)
- p) If you have an attachment you can upload (*works the same as attaching a document to an email - optional*)
- q) Add notifications (***optional – but I suggest making sure the box is checked for volunteers receive a reminder email***)
- r) Click Save
- s) Click invite volunteers – from here you can choose to email all Zonta Club Mid-Maryland members or email specific members (***if you choose to email specific members the screen opens with each members name - email addresses associated are those we have on file for each member in the database – click the box next to the members name if your activity is for specific people otherwise just click all volunteers***)
- t) Then write your message for the volunteers (***This will appear in the body of the email to the volunteers you've selected***)
- u) I suggest hit send and preview (Important – This allows you to preview the message before it goes to other members)
 - 1) Log into your personal email that is on Zonta Club Mid-Maryland has in the database
 - 2) Open the previewed email and check if you want to make any corrections

- 3) After reviewing the email – go back to Track-It-Forward
- v) After you've reviewed the email if you are satisfied then just click the **orange "Send"** button. If not satisfied go back and make your corrections (*This sends the email to all the members you've selected to receive a Track-it-Forward request – **you must click the send button for all to receive**)*

4. Responding to a Track-it-Forward email

- a) Open the email and if you choose to participate in the organizers request then **click** on the link to view this event on Track-it-Forward within the body of the email
- b) Please **DO NOT** just reply to the email as it will not go back send it back to the organizer – You must use the link provided within the email.

Note: Whoever creates the activity to send to members is the only member that will receive notices and response when there is a reply.

Track-it-Forward is a wonderful tool to create event sign in sheets and keep track of activities going on within the organization as well as many other things. You don't have to use it just to request volunteers. You can use it to send out notifications or anything else you may want to share with all of us.

Most importantly I hope this short guide helps you successfully navigate through Track-it-Forward.

Blessings,

Nicole Barnes

Service Committee Chair

