

WHITE EAGLE PTA VOLUNTEER MANAGEMENT SYSTEM / PTO MANAGER

QUICK REFERENCE GUIDE

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1. HOW DO I LOGIN TO PTO MANAGER?

1. Go to PTO Manager at <http://www.wepta.ptomanager.com/>
2. Your login is your email address
3. The first time you login, you will have to request a password :
 - Go to 'Already a Member' and select 'log-in'.
 - Go to 'Forgot your password', enter your email and your password will be sent to you via email. Return to PTO Manager, enter login / email, and password, YOU'RE IN!
 - **Once you log-in :**
 - a. You can change your password, view/edit your profile, and view our events for the year.
 - b. Please review your personal information making sure your contact and student information has been added and is accurate.
 - c. Please review **the 'Volunteer Interests'** tab to make sure that the volunteer areas of interest that you had indicated on the White Eagle PTA Volunteer Opportunities form have been entered accurately, feel free to make desired changes.
 - d. Please note : The email indicated on your profile will be the only email that will receive important PTA announcements and communications. Please contact Chris Cullen at sixcullens6@comcast.net if you would like to have additional email accounts receive this information.

2. HOW DO I IDENTIFY VOLUNTEERS FOR MY EVENT / ACTIVITY?

FOR COMMITTEE CHAIRS / CLASSROOM HEAD PARENTS / EVENT LEADERS ONLY

1. Go to the Volunteers tab
2. Go to 'Find Volunteers'
3. **IF** you are simply looking for one specific volunteer, go to the '**Basic Criteria**' section and enter any of their personal information to identify them.
4. **IF** you are looking to identify all volunteers who expressed interest in your committee / event / activity, go to '**Any of these interests**' area and use the pull-down lists to select your area of interest. You can choose up to 3 interests and it will qualify all volunteers for all of those interests.
5. **IF** you are looking for only those individuals in a certain grade level and / or class you have the ability to indicate that at this time.
6. Once all the criteria is selected, Press **SEARCH**. The list of volunteers will be displayed below.

3. HOW DO I CONTACT VOLUNTEERS?

*******THIS INFORMATION IS FOR WHITE EAGLE PTA USE ONLY*******

Once you have identified your volunteer group in #6 above you have 2 ways in which you can contact and communicate with your volunteers :

Refer to the upper right corner of your screen :

1. Go to '**Save list to my computer**' : Your computer will open Microsoft Excel and display all the volunteer contact information. You can simply copy / paste these emails if you choose to use your email service.
2. **OR** Go to '**Send Email to this List**' : You will email the volunteer list directly from the PTO Manager system. The PTO Manager email format will be displayed, simply fill out the desired subject and body of the email, you may also add attachments at this time. Press **SEND**. All emails go out "BCC" so email addresses are private.

PLEASE NOTE : If your computer blocks "pop-ups" you could be timed out if you are composing a long email. The system does not have a spell check function. WE STRONGLY SUGGEST YOU TYPE ANY LONG EMAILS IN A PROGRAM LIKE OUTLOOK AND COPY THEM INTO PTO MANAGER TO PREVENT DATA LOSS!

PLEASE CONTACT CHRIS CULLEN AT sixcullens6@comcast.net WITH ANY EMAILS THAT ARE RETURNED TO YOU WITH 'FAILURE TO DELIVER'.

Please feel free to contact Chris Cullen at sixcullens6@comcast.net if you have any questions or need additional help.