

SIGN UP GENIUS – USERS GUIDE

INTRODUCTION

This document was written to help you understand how to use SignUpGenius (SUG). If you are having difficulties, you might want to print this document (in color) and have it handy when you are using SUG.

SignUpGenius functions differently depending on whether you have a SUG account:

➤ **We recommend that you have a SUG account.**

If you have an account, the system recognizes your email address and provides easy access to all of your sign-ups. Creating an account only requires your email address and a password. You will not receive any spam or junk mail.

➤ If you prefer not to have SUG an account, you can easily sign up for events. However, if you want to make a change to your sign up, your identity must be validated. To accomplish this, you are required to enter your email address, the system will email you a link so you can make changes.

You should have an understanding of the Master Gardener Volunteer Management System (VMS) before using this procedure.

SignUpGenius makes periodically makes changes to the system. When we discover changes, we update this document. If this document needs updating or if you have suggestions as to how this document can be improved, please contact one of your SignUpGenius Administrators:

- Ellie Aitken
- Barbara Brink
- Helen Montag
- Mo Price
- Susan Starr

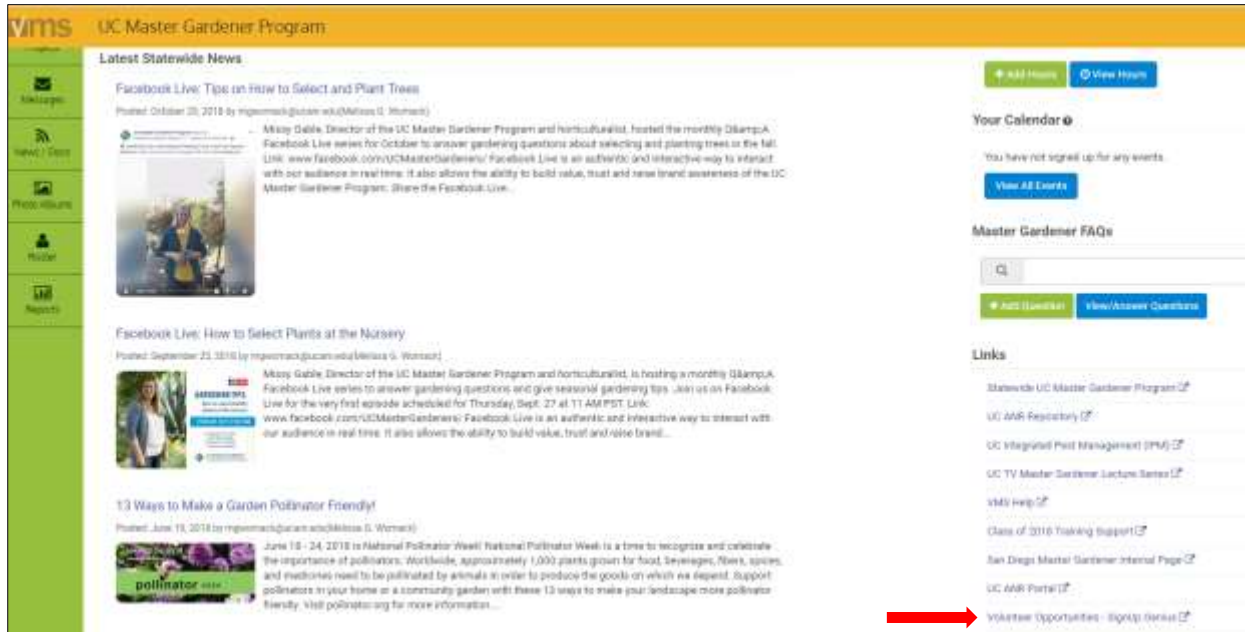
January 9, 2020

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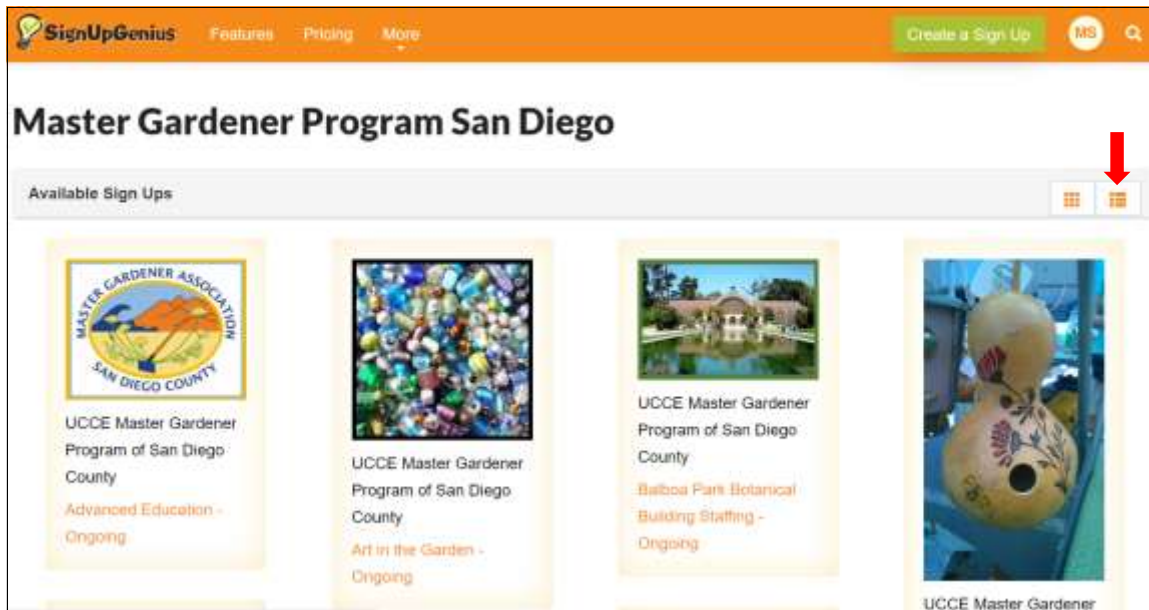
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Topic #1. Sign Up for an Event

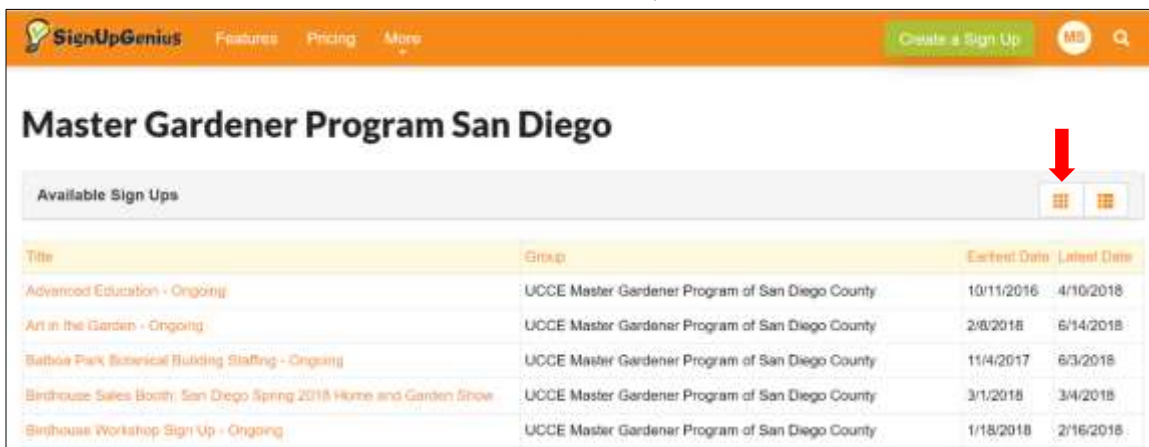
1. Access the home page of the MG Volunteer Management System (VMS).
2. In the “Links” area, on the bottom, click on **Volunteer Opportunities – SignUpGenius**.



3. Sign Ups are shown in Thumbnail format. If you prefer **List format**, click on the **List Icon**.



4. List format. To return to Thumbnail format, click on the **Thumbnail icon**.



5. To select an Event, click on the **Title** or the **Thumbnail**.
6. The SUG General Information page displays, giving you information about the event. At the bottom of the screen, you may access PDF's for additional information about the event (if available).

7. Scroll down to select a slot.

Photography <small>Coordinator: Art Adams</small>	06/04/2017 (Sun)	7:00am - 11:30am (2)	Sign Up
		11:00am - 3:00pm (2)	Sign Up
Storage Unit Organization <small>Coordinator: Anita Smith, Check to ensure that everything is accounted for and returned to proper place</small>	06/06/2017 (Tue)	9:30am - 12:00pm (4)	Sign Up

Click on Sign Up →

Then scroll to the bottom and click on Submit and Sign Up

Submit and Sign Up ←

8. The **Sign Me Up** screen displays.

Sign Me Up

Available Slot	Date (mm/dd/yyyy - PST)	Comment
Docent	Fri., 03/17/2017 12:00pm - 3:00pm	

Name: First Last

Email:

[Already have a SignUpGenius account? Login](#)

By signing up, you agree to the SignUpGenius Terms of Service and Privacy Policy.

[Sign Up Now](#) [Cancel](#)

9. Add a Comment, if you like.

10.If you already have a SUG Login, click on **Login**, then Login on the next screen.

- After you Login, you will return to the **Sign Me Up** screen.
- Click on **Sign Up Now**
- The **Thank You** screen displays. Go to #13 below.

11.If you do NOT have a SUG Login, click on **Login**.

- When this **Login screen displays**, click on **Register**

SignUpGenius Login

[Register](#)

Email:

Password:

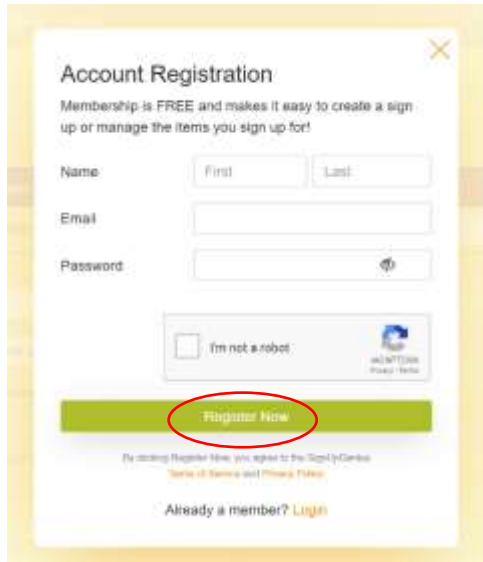
[Login](#)

☐ Remember Me Forgot your password?

[Login with Facebook](#)

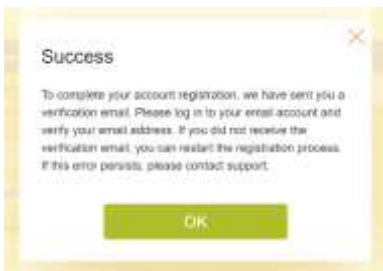
b. The **Account Registration** screen displays.

- c. Enter your information, and record your password.
- d. Then click on **Register Now**.



The screenshot shows a web form titled "Account Registration" with a close button (X) in the top right corner. Below the title, it states "Membership is FREE and makes it easy to create a sign up or manage the items you sign up for!". The form includes input fields for "Name" (split into "First" and "Last"), "Email", and "Password" (with a strength indicator). There is a checkbox labeled "I'm not a robot" and a CAPTCHA image. A green button labeled "Register Now" is circled in red. Below the button, there is a line of small text: "By clicking Register Now, you agree to the Sign Up Guide" and a link "Terms of Service and Privacy Policy". At the bottom, it says "Already a member? [Login](#)".

- e. The **Success** screen displays. Click **OK**. You will return to the **Sign Me Up** screen.
- f. Access your email and Register for a **SUG** account.



The screenshot shows a "Success" message box with a close button (X) in the top right corner. The text inside reads: "To complete your account registration, we have sent you a verification email. Please log in to your email account and verify your email address. If you did not receive the verification email, you can restart the registration process. If this error persists, please contact support." Below the text is a green button labeled "OK".

- g. When you have completed the **SUG** registration, **go back to Step 10**, and login with your new account.

12. You are not required to create a **SUG** Login, but it will be easier for you in the future. Please do so. If you really don't want to create an account, enter your Name and Email. Then click on **Sign Up Now**.

13. After you have completed a transaction in SUG, a **Thank you** screen displays. You will immediately receive a confirmation email, and a reminder email shortly before the event. If you do not receive these emails, the 'email reminders' feature may be disabled; see **Topic #7 Notifications**.



14. You have 3 options on this screen:

- a. Hit **Back to VMS** and return to the VMS SignUp page (with the SUG icons). Note: if you entered the sign-up from someplace other than the VMS, you will be taken to the VMS sign-in page to enter your login information
- b. Hit **Return to Sign Up** to return to the Sign-up.
- c. Hit **Edit My Sign Up** to return to the Confirmation Page.

Topic #2. Change or delete your sign-up

1. To change or delete your sign-up, after the General Information page of the sign-up, just before the slots, click **change your sign up**.

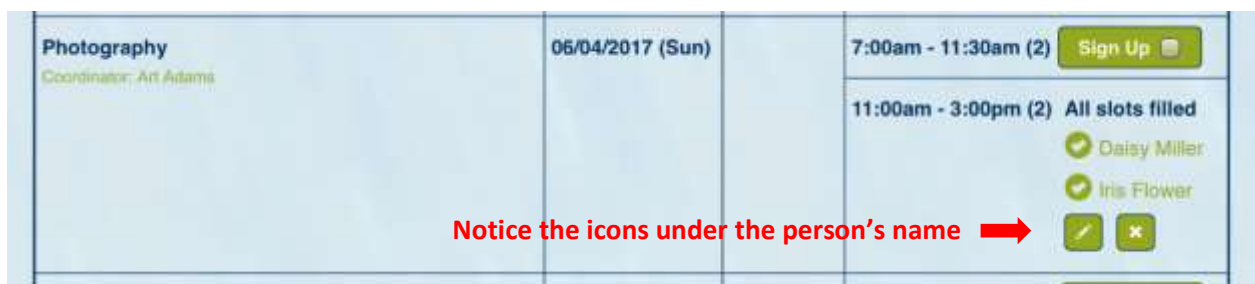


2. The following screen displays. Select one of the 3 options and follow the instructions.



3. When you return to the Sign Up, you will see an **Edit** and **Delete** icon under your name for each of your activities.

Note: If you want to change your slot to a different time, you should delete the existing slot, then add another slot.



The pencil is for Edit

The X is for Delete

Submit and Sign Up

4. Click on the **Edit** or **Delete** icon, then click on **Submit and Sign Up**.

5. **Edit** - if you select **Edit**, this screen displays:

You can change your comment

Display a different name, for this transaction only

Or click here and change your name for all future transactions.

Choose to Update or Cancel this transaction

Note: If you want to change your name in SUG for this transaction, you can do so here. Then, if you want to change your name for all future transactions, check the box on the left.

6. **Delete** - if you select **Delete**, this screen displays:

The screenshot shows a confirmation dialog on a yellow background. At the top, it says 'Test Sign-Up' and 'x Tips & Testing - Ongoing'. Below that is the question 'Are You Sure?'. The main text asks: 'Are you sure you want to delete your sign up for "x Tips & Testing - Ongoing"?'. It then specifies the event details: '06/03/2017 (Sat) 4:00PM - 8:00PM PST - Literary Tent'. A warning states: 'This sign up will be permanently removed. There is no undo.' Below this, it says: 'Notification will be sent to the administrator (Whoever) with the following comment:'. There is a text input field for the comment. To the right of the input field is a red arrow pointing left and the text 'Send a comment, if you like'. At the bottom, there are two buttons: 'YES - DELETE' and 'NO - CANCEL'. To the right of these buttons is a red arrow pointing left and the text 'Choose to Delete or Cancel this transaction'.

Test Sign-Up

x Tips & Testing - Ongoing

Are You Sure?

Are you sure you want to delete your sign up for "x Tips & Testing - Ongoing"?

06/03/2017 (Sat) 4:00PM - 8:00PM PST - Literary Tent

This sign up will be permanently removed. There is no undo.

Notification will be sent to the administrator (Whoever) with the following comment:

← Send a comment, if you like

YES - DELETE **NO - CANCEL** ← Choose to Delete or Cancel this transaction

7. You will return to the Sign-up, when finished.

Topic #3. Sign-up someone else for an event.

If you have an account, you can specify an alternate name (like a spouse or child). The sign-up will be under your email address, but their name will be on the sign-up. Confirmation and reminder emails will be sent to your email address, referencing the name of the person that you signed up.

1. Select a slot, then click on **Submit and Sign UP**

A new slot Test Sorting	06/06/2017 (Tue)	9:30am - 12:00pm	1 slot filled - more available Daisy Miller Sign Up
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Submit and Sign Up

2. Click on the box to the left of **“Display an alternate name...”**
3. Then, enter their personal information.

Sign Me Up For:

Date (mm/dd/yyyy - PST)	Available Slot	Qty	Thank you for signing up!
06/06/2017 (Tue) 9:30am-12:00pm	A new slot	1	Enter a comment, if you want....

You are logged in as: Iris Flower ([This isn't me](#))

☒ Display an alternate name (like a child or spouse's name) on the sign up page.

First Name:

Last Name:

☐ Make this name my default member name.

☐ Send me a confirmation email with an iCalendar (.ics) file.

4. Click on **“SIGN UP NOW!”**. You are done.

Topic #4. Access your SignUpGenius account

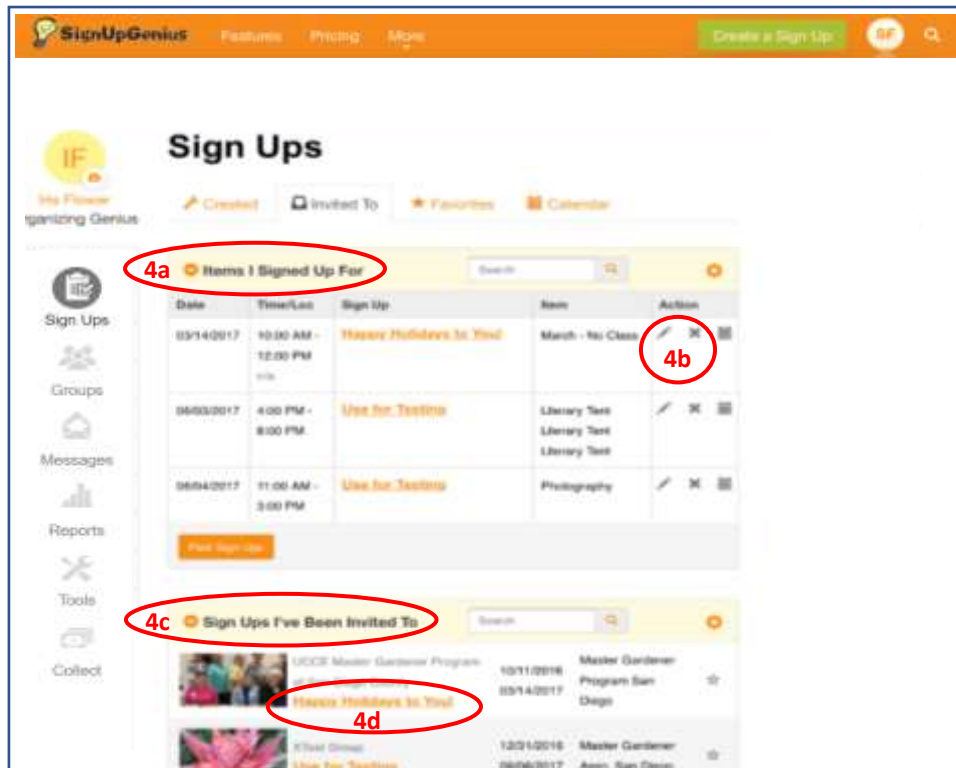
If you create a SignUpGenius login, you will have quick access to SUG. You can sign up for new events or modify/delete your sign ups, change your password, name, preferences, etc.

1. If you have added your SUG Login to your Favorites, Login.
2. If not, Login to SUG: www.SignUpGenius.com
Then Click on **Member Login** and enter your account information.
3. If you are not a SUG member, you can register here, by clicking on **New Member Registration**. Follow the instructions; you will need to confirm your email address by replying to an email.



The image shows the SignUpGenius Login page. At the top, there is a title "SignUpGenius Login". Below the title, there are two tabs: "Member Login" (highlighted with a red arrow) and "New Member Registration". Under the "Member Login" tab, there are three input fields: "Email:" (with a red arrow pointing to it), "Password:" (with a red arrow pointing to it), and "Remember me" (with a red arrow pointing to the checkbox). To the right of the "Remember me" checkbox is a link that says "Forgot your password?". Below these fields is a green "LOGIN" button. Under the "LOGIN" button is a horizontal line with the word "OR" in the center. Below the line is a blue button that says "LOGIN WITH FACEBOOK" with a Facebook logo icon.

4. When you login, the **Sign Ups** screen displays listing sign ups for all organizations that you belong to, that use SUG.
 - a. The top portion of this screen shows events that you have signed up for. You can modify/delete all of your sign-ups here.
 - b. Click on the Edit (pencil) or Delete (x) icon to make changes.
 - c. The bottom portion of the screen shows all sign-ups which you can access.
 - d. To sign up for a new event, click on the Name of the Event.



Settings Screen

5. There is a hidden menu on the above screen. To access, click on the Gravatar (this is the circle with your initials in it).



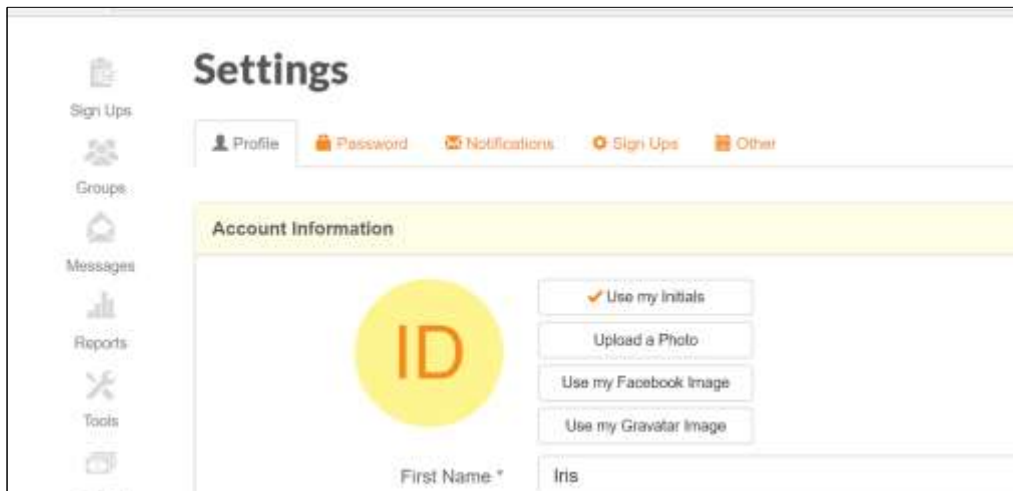
6. A drop-down menu displays.



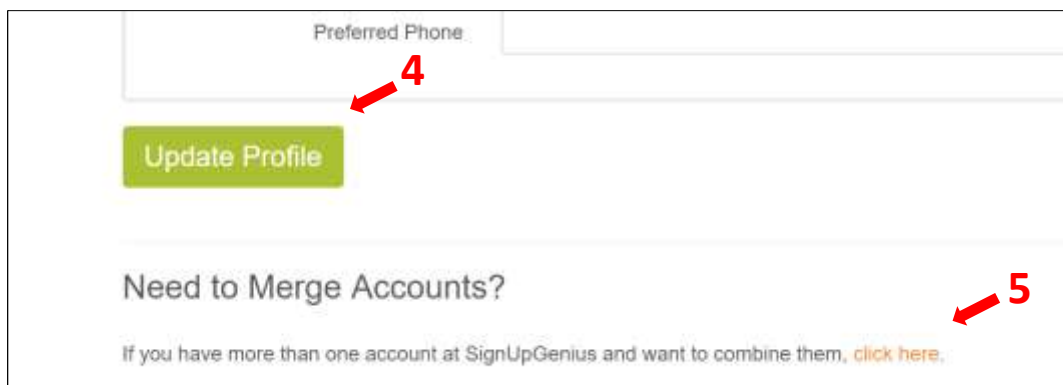
7. Click on **Settings** to update your profile, go to the next page.
8. To Exit, click on **Log Out**.

Topic #5. Update your profile

1. See **Topic 4** to access the Settings screen.
2. In the Settings menu, you will probably only use the 1st three options: Profile, Password and Notifications. The other 2 options are used if you create sign-ups.
3. Use the **Profile** screen to change personal information.



4. Then hit Update Profile.



5. Merge or combine accounts. If you have a new email address, you can set up a 2nd SUG account with your new email address.

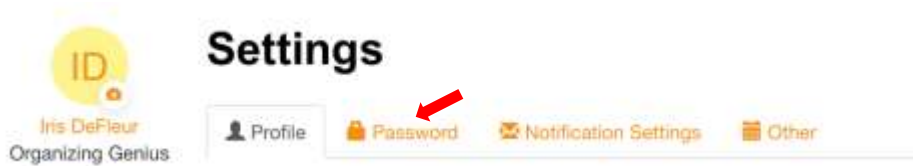
Then, you can combine the 2 accounts and place all sign-ups under the new email address. Select "**click here**" and follow the instructions.

Topic #6. Reset your password

1. See **Topic #4** to access this Settings screen.

- If you have forgotten your password and cannot Login, click on the **“forgot your password?”** option on the SUG Login page. A new password will be sent to your email address.
- If you want to change your password, once you have logged in:

On the Settings screen, click Password. Enter and confirm your new password.

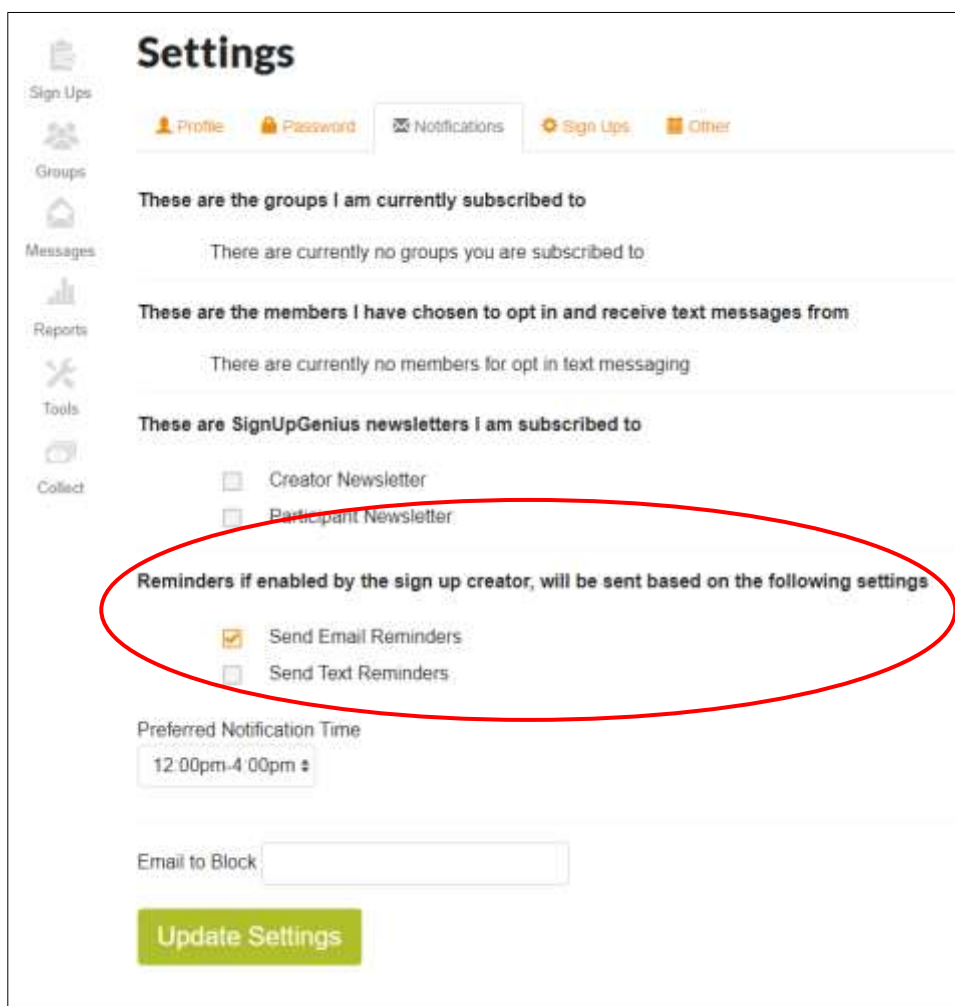


Topic #7. Notifications

We send email from SignUpGenius for a number of reasons:

- Confirmation, upon sign-up
- Reminder emails shortly before the event
- Ad-Hoc emails just before an event, containing important information such as Location of addresses for Garden Tours, Volunteer Information for the Spring Seminar, etc.
- We schedule tasks for Trainees such as Exhibit displays, Lab assistants, What's that Bloomin' Thing Presentations and bringing Snacks to class.

It is important that **Send Email Reminders** is checked, otherwise you will not receive important reminders about upcoming events.

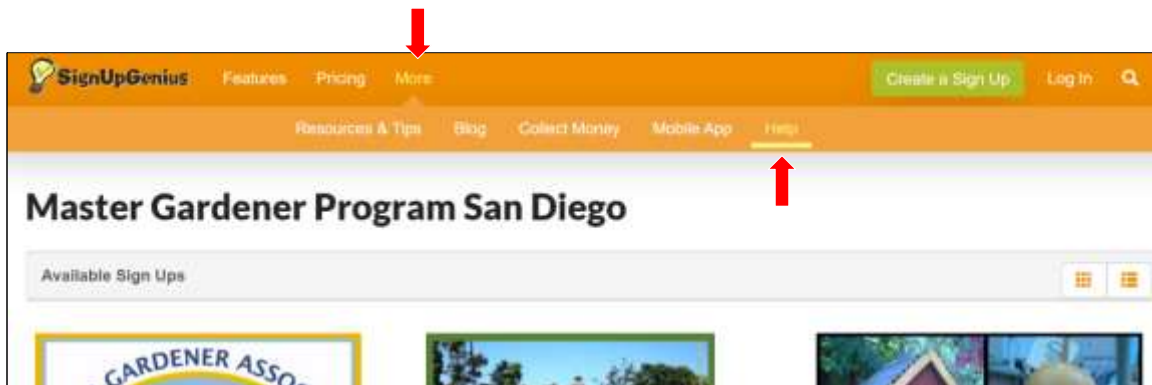


The screenshot shows the 'Settings' page of the SignUpGenius application. On the left is a sidebar with icons for Sign Ups, Groups, Messages, Reports, Tools, and Collect. The main content area has tabs for Profile, Password, Notifications, Sign Ups, and Other. The Notifications tab is selected. Below the tabs, there are three sections: 'These are the groups I am currently subscribed to' (empty), 'These are the members I have chosen to opt in and receive text messages from' (empty), and 'These are SignUpGenius newsletters I am subscribed to' (with checkboxes for Creator Newsletter and Participant Newsletter). A red oval highlights the 'Reminders' section, which contains the text 'Reminders if enabled by the sign up creator, will be sent based on the following settings' and two checkboxes: 'Send Email Reminders' (checked) and 'Send Text Reminders' (unchecked). Below this is a 'Preferred Notification Time' field set to '12:00pm-4:00pm' and an 'Email to Block' input field. At the bottom is a green 'Update Settings' button.

Topic #8. Delete your account

If you have 2 SUG accounts, you can merge them. This may eliminate the need to delete an account. To combine or merge two accounts, see Topic #5.5.

1. To delete your account, on any SUG screen, click on **More**, a dropdown menu displays, click on **Help**.



2. On the Help screen, type **Unsubscribe**



3. When the **Search Results** display, click on **“Unsubscribe from SignUpGenius”**. Follow the instructions on the next screen.



TIPS

1. When accessing large sign-ups, it is sometimes cumbersome to find a sign-up. Let's say you are looking for "Venue Clean-up".
 - Hold the **CTRL** key and hit **F** (for **Find**) – if using a PC
 - or Hold the **CMD** key and hit **F** (for **Find**) – if using a MAC
 - A white box appears on the top of the screen.
 - Key a portion of your word, such as "clean".
 - You will be taken to the 1st occurrence of "clean".
 - Hit **Enter** and you will see the next occurrence, etc. Note: **CTRL/CMD** functions are not available on all devices.
2. If you want quick access to your sign-ups, without accessing the VMS, see Topic #4. Then, store the SignUpGenius Login in your Favorites.
 - This is handy for anyone that has signed up for multiple events and wants to see them all on one page.
 - You will also see sign-ups for other organizations if you used the same email address.
1. Do you want to change or correct your name in the system? Do you have a new email address?
 - See Topic #4 for information on how to access your **Profile**, and change your personal information.
 - Or access **Password** to change your password
 - If you have a new email address, it is easiest to set up a new email address in SUG. Then see Topic #5 to merge your two accounts.
4. More to come..... please let us know if you have any suggestions. **Thanks!**