

# Compassionate **Impacts**

Engage > Serve > Fulfill

## Meet the Need User Guide

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## LIABILITY PROTECTION

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**Privacy Policy:** <https://meettheneed.org/privacy.php>

## DASHBOARD

Q: How do I hide a module that I am not currently working with from my organization's Dashboard?

In the upper right hand corner of each module box on your organization's Dashboard you can hide the module by clicking the "-" (minus) sign. The module will move under the **Add Modules to Dashboard** header below your Dashboard.

Q: How do I maximize a module so I can begin to use it?

At the bottom of your Dashboard under the **Add Modules to Dashboard** header, simply click the "+" (plus) sign next to the name of the module you want to begin using.

Q: Which browser is best for me to use?

MTN is compatible with the more recent versions of all major browsers.

## POSTING NEEDS

Q: Where can I find Best Practices for posting needs? ([View Instructional Video](#))

[http://meettheneed.org/organizations/downloads/shared/Best\\_Practices\\_Posting\\_Needs.pdf](http://meettheneed.org/organizations/downloads/shared/Best_Practices_Posting_Needs.pdf)

Q: How can I attach waivers, instructions or other documents to my need postings? ([View Instructional Video](#))

You can attach waivers, surveys or any other information within your postings. Just add a link (to that document) in your post and Meet The Need will automatically convert that link into the words "Click Here", which will be a hyperlink taking users to your document. For example, "Before volunteering, please print and sign the attached waiver – Click Here."

Q: What is the **Per User Limit** for a need? ([View Instructional Video](#))

When posting a need the **Per User Limit** limits the number of items or volunteers any one user may register to bring. For example, a Per User Limit of 1 means that each and every person must register to adopt the need. Use a Per User Limit of 1 when you want to make sure you have the contact information of each person serving. If left unchecked a group leader can bring as many people as they would like, up to the number needed. Although MTN's group signup functionality permits group leaders to invite or enter in each individual, we do not require group leaders to provide the names and contact information of each person in the group.

Q: How do I delete a need? ([View Instructional Video](#))

MTN does not permit deletion of needs that have been posted. Deleting a partially filled or filled need posted would cause errors in the reports on Organizational and Personal Dashboard reports because commitments made to meet those needs would no longer have a need with which to associate. However, you may deactivate needs at any time. Our reports default to only show **Active** needs so **Inactive** needs stay out of

view unless you need them (by selecting **Inactive** from **View Status** drop down above the **Open**, **Filled** and **Expired Needs** reports).

Q: Can I post needs for more than one day/shift or with no set date? ([View Instructional Video](#))

For volunteer needs, you may post them as **One-Time**, which has only one shift, or as **Open-Ended** which has no set date (i.e. needed anytime), or as **Recurring** which has multiple regular occurrences on either a daily, weekly or monthly basis. Selecting the **Recurring** option automatically creates those individual occurrences (over the date range you specified) toward the bottom of the table. Each of those occurrences may be edited (e.g. if a particular day falls on a holiday).

Q: Why can't I post needs for an indefinite length of time? ([View Instructional Video](#))

In order to keep the database clear of expired needs, we do require an end date for each need posted. Otherwise, organizations could post needs for an indefinite period. Many times needs change and administrators may forget to update those needs, so all needs must have an expiration dates, at which time it will stop appearing in search results.

Because needs with nearer-term shifts and expiration dates appear first in search results, we suggest posting needs more frequently (or adjusting expiration dates on a regular basis) rather than giving them expiration dates in the distant future.

Q: How can I post a volunteer need without a time assigned to the need so that it is flexible? ([View Instructional Video](#))

You can post your volunteer needs as **Open Ended** on the need posting form and indicate in the description of the need that you are flexible as to when the need is met.

Q: Can I save a need and post it later? ([View Instructional Video](#))

Yes, you can create a need and make it **Inactive** until you are ready to activate it so it can be seen in search results. Access inactive needs by selecting **Inactive** on the **Visibility** drop down on your **Open/Partially Filled**, **Filled** or **Expired Needs** reports. Click **Edit** next to that need and set **Display Status** to **Active**.

Q: Can I remove a need from search results? ([View Instructional Video](#))

On your **Open/Partially Filled**, **Filled** or **Expired Needs** reports, click **Edit** next to that need and set **Display Status** to **Inactive** to stop the need from being displayed on any web sites, including your own. NOTE: You can also set the **Expiration Date** to a past date to remove the need from all web sites automatically.

Q: How can I restrict the view status of the need so it is only seen by selected individuals? ([View Instructional Video](#))

On your **Open/Partially Filled**, **Filled** or **Expired Needs** reports, click **Edit** next to that need and set **View Status** to **Public** to publish it instantly out to the entire Meet the Need network, click **Semi Private** to show it only on your web site, or select **Members Only** to restrict it to only be seen by your Approved Members (e.g. background checked individuals). **Members Only** status will require that individuals log in first to prove that they are an approved "member" of your organization or team, authorized to see and meet that need.

Charities will normally select **Public** when posting a need because they will always want their needs to be shared with local churches and companies.

Q: Which module should I use to post my needs? ([View Instructional Video](#))

- MTN has 4 [main modules](#):
  - **Volunteer & Goods Management**
    - One time, recurring or open-ended needs for volunteers
    - Post needs for items
  - **Shared Case Management**
    - Post needs for families in your community
    - Record family visits and assistance you provided
    - Schedule families to receive goods/services in the future
    - See what other organizations have helped families in your community
  - **Events Management**
    - Post needs for one time or ongoing special events
    - Event has a definite begin and end date
    - Want to create your own categories for customized posting and searching
    - Post needs for multi-location and multi-organization events
  - **International Missions**
    - Post needs for your missionaries in the field
    - Post needs for upcoming mission trips
    - Add missionaries and record your missions activity

Q: What are recurring needs and how do I post them? ([View Instructional Video](#))

**Recurring** needs have multiple regular occurrences on either a daily, weekly or monthly basis. For example, a volunteer need for every day this week from 9am-12pm or every Tuesday for the next month from 9am to 12pm. Selecting this option automatically creates those occurrences toward the bottom of the table on the need posting form. Each occurrence may be edited (e.g. if a particular day falls on a holiday). Individuals can pick which date(s) they wish to adopt or they can opt to adopt every occurrence.

Q: Why can I only post a recurring need for up to 6 months? ([View Instructional Video](#))

We restrict the maximum duration of a recurring need to 6 months in order to keep the list of needs listed on Meet The Need current. Allowing needs (especially recurring needs where one need can equate to many occurrences) to be posted more than 6 months out has resulted in needs appearing in search results that are longer relevant. To maintain those recurring needs on an ongoing basis, Key Contacts may continue to add occurrences each week as prior occurrences roll off (because the dates have passed).

Q: How do I add a recurring need as biweekly? ([View Instructional Video](#))

After creating a **Recurring** need on a specific day of the week, delete every other occurrence of that need.

Q: Can I change the category or sub-Category of a need that I have already posted? ([View Instructional Video](#))

We do not currently allow for the category or sub-category of a previously posted need to be changed. We suggest making the need **Inactive** on your **Open/Partially Filled**, **Filled** or **Expired Needs** reports and reposting it with the correct category or sub-category.

Q: Can I create my own categories when posting a need? ([View Instructional Video](#))

You can only create your own categories only if you are using our Events module. Otherwise, you can select from the wide variety of categories and sub-categories for each type of possible need that Meet The Need has refined over many years. Standardizing categories and sub-categories and keeping them consistent is important for aligning both the posting and searching of needs.

Q: Can I duplicate a need to make it easier to repost? ([View Instructional Video](#))

Yes. There are two ways to duplicate a need:

- 1.) After you post a need, the screen that follows will ask you whether you would like to **Duplicate** that need. If you select that option, a new need posting form will appear with all of the information you just completed prefilled so you can modify as necessary and quickly post the new need.
- 2.) On your **Open/Partially Filled**, **Filled** or **Expired Needs** reports you can look up a need that has already been posted and click the **Duplicate** button next to that need. When you click **Duplicate**, the need posting form will be prefilled with the same details as the prior need so you can modify as necessary and post the new need. You cannot duplicate a **Recurring** need because of the complexity of replicating the specific occurrences which may or may not have been altered by the Key Contact.

Q: Can I add a shift to a recurring need? ([View Instructional Video](#))

On your **Open/Partially Filled**, **Filled** or **Expired Needs**, each **Recurring** need will show an **Add Shifts** button on the right. Click that button to load in additional times for a volunteer need that day. Each shift added will appear as a separate need on your **Open/Partially Filled Needs** report.

## SHOWING NEEDS

Q: What are the Best Practices for displaying needs to ensure they get met?

[http://meettheneed.org/organizations/downloads/shared/Best\\_Practices\\_Quick\\_Reference.pdf](http://meettheneed.org/organizations/downloads/shared/Best_Practices_Quick_Reference.pdf)

Q: What is a Link? ([View Instructional Video](#))

Links show the needs you post. Each link may be customized to show any type of need, no matter how narrow or broad, within or outside of your organization. Your links can be attached to buttons, menu items, pictures, or text on your website or sent out via email in messages, Word documents or newsletters.

Q: What kinds of links can I make? ([View Instructional Video](#))

Your [Link Manager](#) under **Settings** on your Dashboard allows you to customize links by:

- Type (Volunteer, Family, Missions)
- Category (of goods or service)
- Location
- Public/Private
- Keyword

You can also choose to receive the links as text, URLs or preconfigured buttons. You may format the buttons by color and style as well as entering text inside the button (e.g. "Volunteer Now!")

Q: Can I get help customizing my links? ([View Instructional Video](#))

Yes, if you need a link that you are not able to customize through your Link Manager (located at **Settings** on your Dashboard) feel free to [contact us](#) for help.

Q: Once we post needs, where do we get our links to show them on our web site? ([View Instructional Video](#))

Showing needs requires links provided to you by Meet The Need in one of three ways:

- 1) Emailed to you when your organization registered

- 2) Retrieve the links from your Dashboard by clicking the **Link** button located in the top right corner of the box for each module, or
- 3) [Create Your Own Links](#) using our link building wizard

If you've created a [Web Site Template](#), each of those links will show the applicable needs on pages that look like your web site.

Q: How do I use links to show our needs? ([View Instructional Video](#))

Simply attach (copy and paste) the link(s) to button(s) on your web site (indicating the types of needs shown) for people to "shop" those needs and sign up to help. For example, buttons may say "Volunteer Now", "Most Needed Items" or "Current Needs of Metro Food Bank". Links can also be attached to your menu items, pictures, or text on your web site. Each link is customized to display only the needs that the organization wants to show on that particular button. The organization can set up its web site however it would like – showing whatever needs it wants to wherever it wants to.

Some churches and companies set up a new "Serve the Community" landing page on their web site with several buttons showing a wide variety of opportunities to help in different ways. MTN provides you a set of [Best Practice Recommendations](#) for implementing Meet The Need on your website, including recommendations for where to display your buttons or links.

Q: How can we get our partners to show our needs on their web site? ([View Instructional Video](#))

Send the [Links You Create](#) to partner organizations who you want to share your needs with their constituents. They will find it much easier to communicate your needs using those Meet The Need links than through their traditional, manual methods (e.g. the pulpit or bulletin for a church). They can simply send the link(s) out via email/newsletter or attach the link(s) to button(s) on their web site.

Q: Why did a need disappear from our search results?

Needs will no longer appear in Search Results if they are met or after the **Expiration Date** you enter. You can change the **Expiration Date** for each need on your **Open/Partially Filled Needs**, **Filled Needs**, and **Expired Needs** reports.

Q: How do we show our needs on our Facebook page?

To display your needs on your Facebook page, please read our [Facebook Tab Set Up Instructions](#).

Q: How can I use MTN with Facebook? [Facebook Tab Set Up Instructions](#)

You have two options for showing your needs or the needs of partner organizations on your Facebook page. First, simply post a comment on Facebook and add whatever MTN link that shows the needs you want to share, direct your followers to search and adopt those needs. Second, you can add a "tab" or "app" to a static link(s) on your Facebook page, taking them to search your needs on your organization's website template. [Click here for further instructions](#)

We have plans to enhance our system soon to allow users to notify their Facebook friends when they have adopted a need encouraging them to do the same.

Q: What other social media sites/applications are compatible with Meet The Need?

Any social media site that allows you to post and repost links can be used to show your needs. Simply copy the links we provide you and paste them in the message or status field of your preferred social media site.

Q: Why should we not mention Meet The Need's name or show MTN's logo on our church's website?  
Serving those in need (e.g. the poor) is a core function of a church. You want to show your members and the community how important compassion is to your church. So you don't want to send members out to a separate "organization/program" to find out how they can serve those in need. If you call your compassion program "Meet The Need" or use our logo on your web site, it could appear you have abdicated serving the community to an outside organization. Instead, it is far better to weave serving, and MTN, into the fabric of your church and web site.

Plus studies show that people are reluctant to go "out" of a website to a separate organization's site. They are more likely to search for opportunities directly on your web site. In other words, fewer needs will be met if you use MTN's logo or name.

In addition, churches have the pastors, the buildings, the programs and the people to help lead people to Christ – MTN does not. So we want to empower the Church and let them see your heart for serving others – not ours. You are the face of Christ to the community, not Meet The Need. So MTN should stay behind the scenes and let your members, visitors and the community see your brand. We recommend calling your MTN section something that fits your church (e.g. Calvary Cares, Building Bridges, Serve).

Q: Where is the best place to put your "Volunteer", "Most Needed Items" and "Serve the Community" buttons?

Meet The Need recommends that you place your links and buttons "above-the-fold". In other words, those buttons should be visible on the upper half of your home page and prominently displayed without requiring the user to scroll down. Doing so will increase the volume of user searches and needs met.

Q: Does MTN create a website for me?

No, our links integrate with and imbed within your web site. We can advise you as to best practices for creating web pages and for placing those buttons. We also provide you with the appropriate links to show your needs. However, we do not build web sites. If you do not have a web site or plan to rebuild it, Meet The Need works with an organization offers a suite of website solutions. [Contact us](#) for more information.

Q: Why is it important for me to communicate to our database of volunteers, members, etc. that internal and local needs may now be found on our web site?

People are not accustomed to going to a charity, company or church web site to search and adopt needs. They are used to hearing about charitable needs or events through emails, a bulletin, the pulpit announcements, etc. and signing up via a paper form. So you will want to communicate and remind them frequently to go to your web site to find ways they can serve others. Driving traffic toward your web site will take workload off your staff and allow you to spend more time cultivating relationships and planning new opportunities to increase your impact in the community.

Q: Can I change the images next to the needs on the search page?

The icons are associated with each type of need based on the category chosen when the need was posted. These icons are used by our members nationwide; therefore, we are not able to customize them. However, if you are running an outreach event, you can create customized categories and subcategories and can also attach your own icon/logo (.jpeg) to your overall event.

Q: Where do I go for resources to share Meet The Need with others in my network so we can all communicate needs much more easily?

Meet The Need has a wide array of materials and videos available to help you encourage others to join the network of MTN users.

If you are a church, sharing MTN with your charity partners will make it much more simple for you to show their needs to your members. For materials to tell your charity partners about MTN, [click here](#).

If you are a charity, sharing MTN with your church partners will make it much more simple for you to communicate your needs directly to their members. For materials to tell your church partners about MTN, [click here](#).

You can also access those materials on the [Share MTN!](#) button on the orange sub-menu on [www.meettheneed.org](http://www.meettheneed.org) or by clicking the blue [Share](#) button on the bottom of your Dashboard.

## MEETING NEEDS

Q: What confirmation and reminder emails are sent to those who commit to meet needs?

A confirmation email is sent immediately after someone signs up to meet a need. Reminders are sent at 21, 7, and 1 day prior to the **Needed by:** date. Recurring volunteer needs only receive a confirmation email and only 1 reminder prior to the first occurrence (due to the number of occurrences). The emails are addressed from the Key Contact of the organization or team who posted the need. The email includes a link asking the user to **Cancel** if their plans have changed or to **Complete** and enter a testimonial after the meet the need. Those links will take the person to their church's or company's web site to perform those actions (if their church or company has a template). Or it will take them directly to the organization's web site who posted the need if they are not associated with a church or company (or if their church or company does not have a template).

Q: Can we customize our reminder emails?

Yes. Under **Settings** on your Dashboard, under **Customize E-Mails & Confirmation Pages** click **Manage E-Mails & Confirmation Pages**, which will walk you through the process of creating a special account to edit our standard content for each of your confirmation emails, reminder emails and your confirmation page.

Q: How are our confirmation and reminder emails addressed?

Emails are automatically sent through the Meet The Need system to those who commit to meet need you post; however, they are addressed from the person who registered the organization or the person who created the team or event. You may edit that Key Contact information on the organization's/team's/event's Dashboard under **My Account** and **Edit Organization Profile**.

Q: How many times will my recurring volunteers get a reminder email?

A reminder email is sent for your recurring needs 21, 7, 1 day prior to the first occurrence ONLY.

Q: If I post a need as **Open ended** why is it important for me to follow up with the volunteer?

Open ended needs have no set fulfillment date, so we suggest following up with each volunteer who commits to meet an open ended need to arrange logistics for when they will fulfill their commitment.

Q: How often will my Approved "Members" get an email when our organization post needs?



No matter how many needs you post on one day, the next morning all your Approved “Members” will receive only one email indicating that your organization has posted new needs.

Q: Can my members adopt needs through their mobile devices?

Yes, MTN is responsive and mobile friendly, meaning the screens will conform to the size of the screen of the device the individual is using to sign up.

## REPORTING

Q: Where can I find information about needs I have posted and edit those needs?

On your main Dashboard page, make sure you are on the Dashboard of the right organization by reading the header at the top left corner. To switch Dashboards to another organization, click the **Select Other Organization** drop down in the top right corner of your Dashboard next to the Dashboard icon. Then click on the **View Needs/Reports** button for the applicable module. The **Open/Partially Filled Needs** report shows needs that you just posted which have not been met or only partially met. **Filled Needs** shows needs that have been fully met and not yet expired (not past the selected **Expiration Date**). **Expired Needs** shows needs you posted that are past the **Expiration Date** of the need.

Each of those reports includes details about who has agreed to meet each of the needs you have posted, including all contact information and whether they signed up on your site or another local site. You can also duplicate, add shifts or edit all needs posted by your organization on those pages.

Click the **Pending Commitments** and **Completed Commitments** buttons to run historical reports showing commitment details and key statistical data across all of your needs on tables, graphs, charts, etc.

Q: Can I export data from reports that I run through Meet The Need?

Yes, all the reports and data tables (e.g. members, assistance history, commitment activity) available to you through Meet The Need can be exported to a CSV file and manipulated as you need them. Look for the **Export** links on each report page.

Q: Where do I find my reports for each module?

On your main Dashboard, click the **View \_\_\_\_ Needs / Reports** buttons shown for each module to see detailed reports about your need you have posted for volunteers, Items, events, families, missionaries or mission trips.

Q: How long are my data/reports available?

MTN does not allow you to delete old needs or data from your dashboard and we do not currently archive data, so your reports will show all data from previous years/months. Select the date range for the information you want to see and export historical data if you would like to do additional analysis.

Q: What are Open/Partially Filled Needs? ([View Instructional Video](#))

A report showing all needs your organization has posted which are either **Open** (those not met at all, in Red) or have been **Partially Filled** (those where a portion has been met, but not fully – in Orange).

On this report, Key Contacts can:

- **Edit** any details about a need (e.g. description, quantity needed, recurrence frequency)
- **Edit** specific occurrences of a recurring need
- **Add Shifts** to a recurring need, loading in additional times for a volunteer need that day
- See all **Details** about every individual or group who has agreed to meet (or partially meet) that need

- **Deactivate** the need
- Alter the **View Status** of the need to make it **Public**, **Private** or **Semi-Private**
- Audit commitments in order to ensure accurate reporting of the fulfillment of commitments (i.e. cancel no-shows, change hours or quantities) and record other changes to those commitments via the **Edit Need Response** button
- **Email** all those who have signed up to meet that need or email just those who have completed their commitments, cancelled or are still pending
- **Duplicate** needs, avoiding the need to reenter information

Q: What are Expired Needs? ([View Instructional Video](#))

This report shows details about needs that have been posted in the past by your organization, including all contact details for each person who met every need. Expired needs are those where the **Date Needed by:** is prior to the current date. Expired needs no longer appear in search results.

On this report, Key Contacts can:

- **Edit** any details about a need, including changing the **Date Needed By** to a future date in order to reactivate a need so that it reappears on the search results again
- **Edit** specific occurrences of a recurring need
- **Add Shifts** to a recurring need, loading in additional times for a volunteer need that day
- See all **Details** about every individual or group who has agreed to meet (or partially meet) that need
- **Deactivate** the need
- Alter the **View Status** of the need to make it **Public**, **Private** or **Semi-Private**
- Audit commitments in order to ensure accurate reporting of the fulfillment of commitments (i.e. cancel no-shows, change hours or quantities) and record other changes to those commitments via the **Edit Need Response** button
- **Email** all those who have signed up to meet that need or email just those who have completed their commitments, cancelled or are still pending
- **Duplicate** needs, avoiding the need to reenter information

Q: What are Filled Needs? ([View Instructional Video](#))

Filled Needs are those that have been fully met (e. g. 10 items or volunteers are needed, and all 10 have been "claimed" by individuals). Filled Needs are color-coded **Green**. Filled Needs no longer appear in search results. If more items are needed, filled needs may be edited to increase the **Quantity Needed**. The need will then reappear on the search results requesting the number of additional items or volunteer spots you entered. That need will also move from **Filled Needs** to **Open & Partially Filled Needs** in that scenario since it is now only partially filled. Similarly, if a volunteer shift or resource need is filled and someone who has agreed to meet that need  **Cancels** or **Decreases** the # of volunteers or items they plan to provide, that need will become unfilled again and will return to **Open & Partially Filled Needs** (needing the number of additional volunteers or items that were cancelled or decreased).

On this report, Key Contacts can:

- **Edit** any details about a need, including increasing the quantity needed so that the need reappears on the search results again
- **Edit** specific occurrences of a recurring need
- **Add Shifts** to a recurring need, loading in additional times for a volunteer need that day
- See all **Details** about every individual or group who has agreed to meet (or partially meet) that need
- **Deactivate** the need

- Alter the **View Status** of the need to make it **Public**, **Private** or **Semi-Private**
- Audit commitments in order to ensure accurate reporting of the fulfillment of commitments (i.e. cancel no-shows, change hours or quantities) and record other changes to those commitments via the **Edit Need Response** button
- **Email** all those who have signed up to meet that need or email just those who have completed their commitments, cancelled or are still pending
- **Duplicate** needs, avoiding the need to reenter information

Q: What are **Pending Commitments by Individuals or Groups** under **View Needs/Reports**? ([View Instructional Video](#))

This report shows all the individuals or groups who have agreed to meet a current need posted by your organization. It provides an easy way to look up each person by name, group affiliation or other search criteria. When an individual, group, church or charity agrees to donate items or volunteer time to meet a need, the Key Contact of the organization who posted the need will see each donor's contact information, the need they met, the date they agreed to meet the need, and the church or company they are associated with (if applicable). The Key Contact will also receive an automated e-mail confirming who has agreed to meet each need. Likewise, the donor will receive an e-mail with instructions for next steps to meet that need.

On this report, Key Contacts can:

- Enter any identifying information about a particular individual or group to see all of their outstanding commitments
- Select from drop down boxes to narrow all commitments by the categories or subcategories of goods or services provided to the organization, families, mission trips, missionaries or events
- Sort Pending Commitments by a wide variety of date ranges (e.g. to follow up with those who have not "completed" promised commitments within a certain period of time)
- View contact details and organizational affiliation (church or company) of each individual or group, the need they agreed to meet, date need is to be met, date they made the commitment, difference between the date the commitment was made and today's date, and the number of items or volunteers committed
- View data, graphs and charts showing key metrics for total commitments (those displayed based on your search criteria above) to meet needs posted by your organization by date range and need type. Metrics include the number of volunteers, items, volunteer hours and other summary level statistics.
- Automatically generate a CSV report showing all of the data for the commitments displayed in the table based on your search criteria.

Q: Why are Pending Commitments converted to Completed status automatically? ([View Instructional Video](#))

All Pending Commitments are converted by the system to "Completed" status 90 days after the expiration date of the need in order to move that commitment off of the "pending list" of the organization. We assume that the person who met the need is not likely to "Complete" the need and enter a testimonial 90 days after the need has expired. Individuals can complete commitments themselves by logging into their personal account/Dashboard, clicking on **My Pending Commitments**, clicking the **Complete** button for that commitment, and entering a testimonial.

Q: What are **Completed Commitments by Individuals or Groups** under **View Needs/Reports**? ([View Instructional Video](#))

This report contains a history of every individual, church, or ministry who has ever met a need your organization posted in the past so you can look them up by name and stay in touch with them, including:

- All contact details for each person or group

- What church or company that person is associated with (if any)
- What need(s) they met
- When and how they met the need
- How many volunteers or items they brought with them
- A testimonial of the experience that person or group had meeting the need
- If that person or group cancelled, why they cancelled

On this report, Key Contacts can:

- Enter any identifying information about a particular individual or group to see all of their completed commitments
- Select from drop down boxes to narrow all commitments by the categories or subcategories of goods or services provided to the organization, families, mission trips, missionaries or events
- Sort Commitments by a wide variety of date ranges
- View contact details and organizational affiliation (church or company) of each individual or group, the need they met, date need was met, date they made the commitment, difference between the date the commitment was made and the date they met the need, and the number of items or volunteers provided
- View data, graphs and charts showing key metrics for total commitments fulfilled (those displayed based on your search criteria above) for needs posted by your organization by date range and need type. Metrics include the number of volunteers, items, volunteer hours and other summary level statistics.
- Automatically generate a CSV report showing all of the data for the commitments displayed in the table based on your search criteria.

Q: As a Key Contact of an organization, how do I see where “members” within my organization are serving?

On your organizational Dashboard, under **My Account** and **Member Reports**, click the buttons to view:

1. **Pending Gifts/Commitments** ([View Instructional Video](#)) – Pending Gifts are commitments by your Approved Members which they have not yet indicated they have fulfilled. For each Pending Gift you can see what they agreed to give (or service they agreed to provide), to whom, quantity and how long ago. For charities, “Pending Gifts” lists all outstanding commitments of your Approved "Members" to meet needs only of your organization. For churches and companies, this page lists all current commitments (adopted, but not yet completed) to meet needs of your organization and other organizations by your Approved “Members”. This allows you to view all of the giving activity that your organization is involved in across any date range or any type of need.
2. **Completed Gifts/Commitments** ([View Instructional Video](#)) – Completed Gifts are commitments by your Approved Members which they have indicated that they have fulfilled. For each Completed Gift, you can see what each member gave (or service they provided), to whom, quantity, how long ago, how long it took them to fulfill the commitment, and a testimonial about their experience meeting each need. For charities, “Completed Gifts” lists all past commitments/gifts of your Approved "Members" to meet needs only of your organization. For churches and companies, this page lists all past commitments/gifts to meet needs of your organization and other organizations by your Approved “Members”. This allows you to view all of the giving activity that your organization is involved in across any date range or any type of need.

Your "members" can “complete” a Pending Commitment/Gift by logging back into their account after they have met the need, going to their Personal Dashboard, clicking on **My Pending Commitments**, clicking on the **Complete** button next to the applicable need, entering a testimonial about their experience meeting the need and clicking **Submit**.

## KEY CONTACTS

Q: What is a Key Contact? ([View Instructional Video](#))

A Key Contact is the person who either created the organization's MTN account, or was given access to be an account administrator of the organization. Key Contacts have administrative access to an organization's main Dashboard and/or to the Dashboard of a sub-organization (team or event) under the organization. Those administrative privileges include posting needs, viewing reports, auditing fulfillment, etc. on behalf of the organization.

Q: How do I decide who should be a Key Contact? ([View Instructional Video](#))

Only staff members authorized to see and manage your organization's needs should be given access to the main organizational Dashboard. Non-employees who your executive leadership wants to empower to manage a specific function's needs/account may be given access to a team (sub-organization) Dashboard. See the [video for creating/managing teams](#).

Q: How is an Individual made a Key Contact of an organization? ([View Instructional Video](#))

You may designate certain individuals as Key Contacts, which will allow them to see your organization's Dashboard and post needs on behalf of your organization. Each person's status can only be changed one at a time. First, have the person [register using this link](#) and select your organization from the drop down in step 2. Then you login to your Dashboard, go to **My Account, Member Status** and click **Pending Members**. Search for that individual and select **Approve** in the first drop down next to his/her name, and **Key Contact** in the second drop down. The next time that person logs in they will automatically have full access to the Dashboard of organizational, team, or event to which you gave them access.

Q: How can I as an individual be added as a Key Contact administrator for my church, company, team or a charity? ([View Instructional Video](#))

If you already have a Meet The Need account, login and on your Personal Dashboard under **Manage My Account**, click the link **Connect with My Church & Local Ministries**. If you do not yet have a Meet The Need account, go to the serving page/button on your organization's web site or register at [www.meettheneed.org](http://www.meettheneed.org) using your email and password. On the second page of your registration, select the name of your organization from the drop down list. Once you have an account and are logged in, click **My Account** or the Dashboard icon to go to your account page. On your Personal Dashboard under **Manage My Account**, click the link **Connect with My Church & Local Ministries**.

Under **Your Pending Organizations** you will see organizations with whom you have requested an association but where the Key Contact(s) of that organization has not yet approved your request.

In the third section, select from the drop downs shown to request to connect ("Join") with organizations to see their needs, receive email notifications when they post new needs, and/or to be made a Key Contact.

- **Join Church** – If you are not already a Pending or Approved "member" of a church in Meet The Need, then you may select one church to "join" so that you may see its needs and be notified when the church posts new needs
- **Join Ministry or Missionary Organization** – Shows a list of all charities within the search radius you specified above for you to consider "joining" to see their needs and opt in to email notifications when they post needs

- **Join a Team from \_\_\_\_\_** - If you are an approved “member” of an organization and they have set up teams in Meet The Need under that organization, then you can see that list of teams on the drop down box(es) and request to **Join** one or more of those teams (to see their needs and opt in to email notifications when they post needs)

You will then be added into that organization’s dashboard as a **Pending Member**. Whoever has current Key Contact access to the Dashboard will need to login and **Approve** you and choose to make you a Key Contact. You will then have full access to that organization’s Dashboard the next time you login and can switch Dashboards using the **Select other Organization** dropdown at the top right next to the Dashboard icon.

Q: A Key Contact is no longer with us. How can I remove their access to the Dashboard or remove them from our MTN account? ([View Instructional Video](#))

On your **Approved Members** page under **Settings** on your Dashboard, you can change a member status from a **Key Contact** to a **Regular Member**. If they are no longer with the organization, you can change their member status to **Deny** instead of **Approved**. If you are only Key Contact and original creator of the organization, event or team, and you want to remove your own association you will need to assign another Key Contact to change your status to **Regular Member**.

## MEMBERS

Q: What is a (Pending or Approved) “member”? ([View Instructional Video](#))

Individuals appear as “Pending” or “Approved” “members” of your organization if they:

- Registered under the name of your organization (because they are associated or want to have an association with your organization)
- Opted in when signing up to meet one of your needs to receive email notifications when you post additional needs in the future

An individual may only have one church or company association but may request an association with as many charities as they would like.

Key Contacts for each organization have the right to Approve or Deny requests by individuals appearing on the Pending Members list to associate with your organization. Approving a request allows that individual to:

- 1) See your organization’s needs on their Personal Dashboards
- 2) Receive automated email notifications when you post new needs

Q: How do I as an Individual become a “member” of an organization? ([View Instructional Video](#))

Typically, this occurs when signing up to meet a need for the first time (through a charity’s, company’s or church’s web site) through Meet The Need. You are asked to indicate whether you are associated with a local organization and provided with a drop down list of local charities, companies and churches that are part of Meet The Need.

You could also go to the [Individual Registration](#) link under the Quick Start/Advanced buttons on [www.meettheneed.org](http://www.meettheneed.org) and register there under the name of an organization (in Step 2).

Q: How do I or my members request our password if we have forgotten it?

Request to have your password emailed to you directly from the [Forgot Your Password?](#) link under the [login](#) screen of [www.meettheneed.org](http://www.meettheneed.org).

Q: Where are my members listed and how do I manage my members? ([View Instructional Video](#))

On your organizational Dashboard, click **My Account** and under **Member Status**, you will see buttons for [Pending Members](#) where you can approve and activate them, [Approved Members](#) where you can manage and assign members, and for [Denied Members](#) where you can store inactive members.

Q: How do I as a Key Contact approve a "Pending" member? ([View Instructional Video](#))

On your **Pending Members** page under **Settings** on your Dashboard, you can change the person's status from **Already Pending** to **Approve** on the **Already Pending/Approve/Deny** drop down to the right of the person's name.

You can approve many people at the same time by clicking the check boxes next to each person's name and then clicking the **Approve \_\_ Selected Members** button. You can also check the checkbox at the top of the table to select all of the individuals in the table below.

Charities typically approve Pending Members (using the **Already Pending/Approve/Deny** drop down) without knowing the individual because those individuals have simply "opted in" to see your needs and receive automated e-mail notifications whenever your organization posts new needs.

If a church or company does not know an individual who has registered under its name and cannot find them in its database, the Key Contact may move that person off its list of Pending Members by clicking **Deny** on the drop down box next to that person's name and then clicking **OK**.

You may designate certain individuals as Key Contacts using the **Regular Member/Key Contact** drop down, which will allow them to see your organization's Dashboard and post needs on behalf of your organization. Each person's status can only be changed one at a time there.

Q: How can I assign many people at one time to a team or event under my organization? ([View Instructional Video](#))

Some organizations use **My Teams** under **My Account** on their Dashboard to form separate groups under their organization to manage particular functions (e.g. Greeters or Ushers for a Church, or Kitchen or Warehouse for a Charity). Using Teams allows leaders of those groups to communicate needs that relate to those functions only to certain individuals (those who are assigned to those teams). Individuals on those teams will receive automated email notifications when new needs are posted by the Team leader.

Administrators of the overall organization may assign those registered under their organization to groups/teams on the **Approved Members** page under **My Account** on their Dashboard by checking the box to the left of those names, clicking the **Assign \_\_ Members to Teams** button, selecting the team from the drop down list, and then clicking **Assign**.

Q: What if the person is no longer associated with our organization? Can we remove that person from our Approved Member list? ([View Instructional Video](#))

You can change the status of a person from **Already Approved** to **Set to Pending** or **Deny** using the drop down boxes next to each person's name on the **Approved Members** page under **My Account**. If you no longer want someone to see your needs on their Personal Dashboard or to receive automated emails when you post new

needs, you may choose **Deny** on the first dropdown to the right of that person's name and click **Ok**. Charities typically approve requests for association without knowing the individual because they want them to see their needs and be notified of future needs. However, churches and companies typically do not approve those who it does not know. Each person's status can only be changed one at a time there.

Q: What is a "Denied" member? ([View Instructional Video](#))

Individuals appear on the **Denied Members** page under **My Account** on your Dashboard if:

- they registered under the name of your organization (because they are associated or want to have an association with your organization), or opted in when signing up to meet one of your needs to receive email notifications when you post additional needs in the future, BUT
- a Key Contact for the organization decided to deny that individual's association with the organization

Therefore, the individual will not:

- 1) See your organization's needs on their Personal Accounts
- 2) Receive automated email notifications when you post new needs

Q: Can I export my "members"? ([View Instructional Video](#))

Yes, you may click the button to **Export All Pending Members** or **Export all Approved Members** to export their information to a CSV file.

## EDIT ORGANIZATIONAL PROFILE

Q: How do I update my organizational information like phone number, email, address, etc.? ([View Instructional Video](#))

From your Dashboard, go to **My Account** and click **Edit Organization Profile** under **My Account Information**. This page shows contact data and other information that was entered when the Key Contact originally registered the organization. You may edit your organization's contact data (name, phone, address, email, etc.) or any other information on this page at any time.

On that page, we suggest leaving **We Deliver to Families?** unchecked. Meet The Need may offer a service in the future for you to refer families to a Help/Prayer Line to offload the work of loading information about families and their needs.

The **Bio** field is your "advertisement" to those searching for needs through the web sites of local churches, charities and companies who use Meet The Need, so you will benefit from clearly expressing your organization's vision and mission here.

## TEAMS

Q: What are teams and why do organizations create them in Meet The Need? ([View Instructional Video](#))

Some organizations form separate groups under their organization's Meet The Need Dashboard. They do so to:

- Organize particular functions within the organization (e.g. Greeters or Ushers for a Church, or Kitchen or Warehouse for a Charity)



- Empower group leaders with state-of-the-art tools, including their own private Meet The Need Dashboard, to more easily manage their function/group
- Restrict the view/adoption of needs to particular individuals (e.g. those who are background checked). Only approved members of teams will receive automated emails when the team/group leader posts new needs. If the needs are posted as **Members Only**, then team members will have to login to see and meet those needs, proving they are actually members of the team.

Q: Can Key Contacts of the overall organization see all of the activities of the teams associated with their organization? ([View Instructional Video](#))

Leadership of the overall organization still maintains control over all aspects of those groups/teams underneath it, including the ability to control who has access to the group/team Dashboards and to see full reports showing the activities of any team leaders or members at any time.

Q: Are team leaders able to see the overall organization's activities or the activities of other teams? ([View Instructional Video](#))

Team leaders can only see and control their own activities. They do not have access to the organization's overall Dashboard, nor can they view the activities of other teams, or send out automatic emails (when they post new needs) to anyone except for those on their particular team.

Q: How do I create a new team under our organization? ([View Instructional Video](#))

To set up a new team (so that they will have a separate Dashboard for managing and posting needs), go to **My Teams** under **My Account** on your Dashboard and click **Add a New Team**. Watch this [video](#) and read the instructions under the **Help** button on the **Add a New Team** page for more information.

Q: How does forming teams enable the organization to control the actions of team leaders? ([View Instructional Video](#))

Creating teams under your organization:

- 1) Empowers team leaders to manage their activities separately from the rest of the organization, not allowing them to see the activity of other teams or the overall organization
- 2) Allows organizations to control the ability of team leaders to share information with other individuals who are not on that team
- 3) Only those who have an interest in that "team's" efforts can join or be assigned to that team. They must opt in and be approved to receive communications directly from the team.
- 4) Enables an organization to restrict the view of certain needs to those who are properly credentialed (e.g. background checked)

Q: How does forming teams restrict the view of certain needs to particular individuals? ([View Instructional Video](#))

When the Team leader posts needs for that role or skill set via the mission team's dashboard, those pre-qualified individuals on that teams will receive automated email notifications. For needs posted as **Private**, team members will have to login to prove they are members of the team before seeing the needs. Team leaders will have a private, dedicated dashboard for their team to post/manage needs, organize team members, and see who has agreed to meet each need.

Q: How can I as a Key Contact for an organization assign someone as a Key Contact of a new team under our organization (but keep them from having access to our main "parent" organizational Dashboard)? ([View Instructional Video](#))

For individuals who are not already “Members” of your organization, have them first register on this [link](#) under the name of your organization (in Step 2). Then go to **My Account** and **Pending Members** under **Member Status** and click **Approve** and **Regular Member** on the drop down lists to the right of the person’s name.

For those who are already Approved Members of your organization, the individual can join the team from the **Connect with My Church & Local Ministries** link on their Personal Dashboard ([View Instructional Video](#)).

Once they have registered and are an approved “Member” of your primary organization, then you can:

- 1) Go to your Dashboard and click **My Account** and **Approved Members** under **Member Status**
- 2) Check the box next to that individual’s name on the list and click the **Assign \_\_ Members to Teams** button, select the team from the drop down list, and then click **Assign**
- 3) Then, switch Dashboards to the team you created (via the drop down box in the top right corner of your Dashboard next to the house icon)
- 4) Go the **Pending Members** page, approve that individual and make him/her a **Key Contact** via the drop downs to the far right of the person’s name

The next time that person logs in, he/she will see a dedicated team Dashboard for them to post/manage their team’s needs and see who has agreed to meet each need.

Meet The Need can also provide you with a special link to easily enable people to directly join your teams or events, whether or not they are a “member” of your organization. Once they join the team or event they will show up on the team/event Dashboard and you can make them a Key Contact. [Contact us](#) to receive the special link to send out to those individuals.

Q: How can I as a Key Contact for an organization assign people to one of our teams? ([View Instructional Video](#))

For individuals who are not already “Members” of your organization, have them first register on this [link](#) under the name of your organization (in Step 2). Then go to **My Account** and **Pending Members** under **Member Status** and click **Approve** and **Regular Member** on the drop down lists to the right of the person’s name.

For those who are already Approved Members of your organization, the individual can join the team from the **Connect with My Church & Local Ministries** link on their Personal Dashboard ([View Instructional Video](#)).

Once they have registered under your organization, then you can:

- 1) Go to your Dashboard and click **My Account** and **Approved Members** under **Member Status**
- 2) Check the box next to that individual’s name on the list and click the **Assign \_\_ Members to Teams** button, select the team from the drop down list, and then click **Assign**
- 3) Then, switch Dashboards to the team you created (via the drop down box in the top right corner of your Dashboard next to the house icon)
- 4) Go the **Pending Members** page, approve that individual and make him/her a **Regular Member** via the drop downs to the far right of the person’s name

Meet The Need can also provide you with a special link to easily enable people to directly join your teams or events, whether or not they are a “member” or not of your organization. Once they join the team or event

they will show up the team/event Dashboard and you can approve them as “members” of the team. [Contact us](#) to receive the special link to send out to those individuals.

Q: Where and how can I view and manage my organization’s teams? ([View Instructional Video](#))

To view and manage each team you created, go to **My Account**, and click **View Teams** under **My Teams**. You will see the name of each team, contact information for the leader of the team, the names of each member of that team, all of that group's pending and completed giving activity, as well as any outstanding "offers" they have entered into the system. You may also deactivate the team or reactivate a team that was previously deactivated under **Activation Status**. The team’s status will change immediately. Keep in mind that the numbers shown for the team’s **Pending Commitments**, **Completed Commitments** and **Offers** reflect all activities of the individual team members, not exclusively their activities within/for that particular team.

You can also directly access each team’s Dashboard by selecting the name of that team from the **Select Other Organization** drop down (which is located to the left of your Dashboard icon in the top right hand corner of your Dashboard). On your team’s Dashboard, the Key Contact for the team can post needs for the team or view reports showing all of the commitment activity for the needs you posted for that team.

Q: As a Key Contact of the organization or a team under the organization, how can I access a team’s Dashboard and what can I do on the team’s Dashboard? ([View Instructional Video](#))

You can directly access each team’s Dashboard by selecting the name of that team from the **Select Other Organization** drop down (which is located to the left of your Dashboard icon in the top right hand corner of your Dashboard). On your team’s Dashboard, the Key Contact for the team can:

- Post or edit the needs of the team, which can include volunteers, resources, family needs, missions needs, etc.
- View reports showing all of the commitment activity for the needs posted for that team
- Retrieve links showing various types of needs of that team/group and attach those links to button(s) for that team on your web site so individuals can join or sign up to meet needs of that group/team

## Managing Internal Volunteering using Teams

Q: Can churches and charities use Meet The Need to manage internal volunteer needs? How do I create an internal serving team (e.g. Greeters or Ushers for a Church, or Kitchen or Warehouse for a Charity) to empower leaders within our organization to manage their department’s needs? ([View Instructional Video](#)) Churches and charities may want to post needs for internal functions (e.g. Ushers, Greeters) that should only be seen by Approved “Members” of that organization. And, for example, churches often want to empower lay leaders of internal ministries with a dedicated Dashboard for each leader to manage and communicate the needs for that ministry.

Use **My Teams** under **My Account** on your Dashboard to create separate “teams” under your organization to manage those functions separately. Assign those registered under your organization to be Key Contacts or Regular Members of those groups/teams using **Approved Members** under **My Account** (see the **Help** button on that page or search the [FAQs](#) for detailed instructions about assigning Key Contacts and “members” to teams).

To post internal ministry needs, go to the Volunteer/Goods Management Module (on the overall organization’s Dashboard or the team’s Dashboard) and click **Post Needs for Volunteers/Goods**. On the drop down boxes on the need posting form, select **Church or Ministry > Volunteers > Serve at My Church** and

choose the appropriate Subcategory in the final drop down. When you post needs for internal volunteers, the **View Status** for all Serve at My Church needs are automatically set to **Semi-Private**, meaning they are only visible on your web site (cannot be viewed through the web sites of other local organizations). Only **Approved Members** of the organization (or the internal ministry team) will be sent an email with a link to sign up to meet that need

## OFFERS

Q: Does MTN have tools for Asset Based Community Development? ([View Instructional Video](#))

Yes. Communicating needs to those who can help is critical. It is equally important to communicate what assets each organization has to offer. Needs and assets are essentially two sides of the same coin. Asset Based Community Development is a common theme among organizations and organizers trying to unite and mobilize cities to address key social issues like hunger, poverty and disaster relief. Meet The Need has developed tools for Asset Based Community Development including the ability to:

- 1) Show the organizations in your area and the services they provide on a customizable, searchable directory system. Contact [Meet The Need](#) for more information about the directory solution.
- 2) When "approved members" of a registered organization search for a need they want to meet but are unable to find one that fits their search criteria, they may post an offer to provide that item or service. The next time a Key Contact of a local organization posts a need in that same category and subcategory as the offer, the Key Contact will see that offer and can decide whether to match up with that offer or bypass the offer and continue with posting the need.
- 3) Organizational administrators may also view local offers, post their own offers and view their own offers directly on their Dashboard

Q: What is an offer? ([View Instructional Video](#))

An offer is an item or service someone has indicated that they have available to provide. Only Key Contacts of approved organizations may see offers either when they are posting a need (in that same category and subcategory) or through the **View Offers** page on their Dashboard. If they find an offer they want to accept, the system will provide them the contact information to connect with that person who made the offer.

Q: Who can post offers? ([View Instructional Video](#))

Administrators of organizations using Meet The Need and individuals who are "approved members" of registered organizations, but only after they have searched for local needs (but could not find one that matched with the goods or services they want to provide).

Q: Do offers expire like regular needs? ([View Instructional Video](#))

Yes, offers have **Expiration Dates** and will show in the system until they are matched, expire, or until the person who made the offer deactivates it on their Personal Dashboard (for offers made by individuals) or on the Organizational Dashboard (under **My Account**).

Q: Where can I find my offers to update them? ([View Instructional Video](#))

Individuals who made an offer should login to Meet The Need through their church's, company's or charity's web site, which will take them to their Personal Dashboard, where they can click **My Offers** and **Edit** next to the offer. Organizations can see their current offers by logging in to Meet The Need, clicking **My Account** and then **My Offers** and **Edit** next to the offer.

Q: If I as a Key Contact for an organization find a local offer on the [View Offers](#) page and want to accept that offer (for an item or service we need) what do I do and what happens next? ([View Instructional Video](#))  
Click [Match with this Offer](#) to connect with the individual or organization who made the offer you want to accept. The page will show you details about the offer:

- [Accepted by](#) – You and your organization’s information
- [Made by](#) – Contact details about the individual or organization who made the offer
- [Info](#) – Description and details about the resources or services offered

When you click [Match with this Offer](#), you will receive an email with contact information for the other organization and instructions. An e-mail will be sent to the Key Contact of that organization as well.

Q: How can our organization post an offer for an item or service we want to make available to someone else? ([View Instructional Video](#))

On the [Post Offers](#) page, fill out all of the information in the [Post Offer](#) box, including the zip code (if in U.S.). As you are posting the offer, the system will search for open needs that match your offer. If a need is found that matches your offer the need will be shown (so that you can meet that need with the offer you were about to post). If no need was found that matches the offer you want to make, fill out the form by entering a [Description](#) of the offer, an [Expiration Date](#) and an estimated [Value](#) of the item or services.

Q: How can I see and edit offers I have made? ([View Instructional Video](#))

On the [My Offers](#) page, you can view and edit details about your current and past offers, including deactivating them. On that page, click [Show](#) to narrow the search results in the table to show only those offers you have made within certain date ranges. Click [Edit](#) to change the [Description](#) of the offer, the [Expiration Date](#) or the estimated [Value](#) of the item or services. You may set the [Display Status](#) to [Inactive](#) if the offer is no longer applicable or available.

Q: When posting a need as a Key Contact of an organization, how do I accept or bypass an offer? ([View Instructional Video](#))

Before posting a need, Meet The Need requires that the Key Contact first search the offers currently in the system because there is no reason to post a need if someone in your area has already submitted an offer to provide those goods or services. You must select from all four of the drop down boxes all the way through to the Subcategory level in order to Search Offers and/or Post Needs.

In the event that the system locates an offer for that particular need/category, simply select [Match with this Offer](#), which will send out e-mails to whoever made the offer with contact information for your organization and instructions for how to meet that need. An e-mail will be sent to the Key Contacts of your organization as well.

If no offers are found or if the offer(s) does not match well with the need you want to post, click the [Post Need](#) button to bypass the offer and post the need. The Category and Subcategory information you entered in the Search Offers box will already be preselected on the form.

## SHARED CASE MANAGEMENT

Q: How can I allow my church members to meet needs of individuals or families directly rather than doing so through the organization who posted the need for that family? ([Watch Instructional Video](#))

As a church you have the ability to allow your Approved “Members” to deliver an item or service directly to a family. When you log into the Dashboard, go to My Account and under **Member Status**, click **Pending Members**. Above the table, you will see a section called **Default Direct-To-Family Setting**. Use that drop down to switch the organization default to allow or not allow your “members” to have the option of delivering to a family directly as you approve them. Meet The Need strongly recommends running background checks on each individual before enabling this setting. If a member is disabled from delivering directly to a family in need, they can still meet needs of families by working with the local charities or churches who posted the need for those families.

As a Key Contact, you also have the ability to enable or disable an individual Approved “member” to deliver directly to families through the **Approved Members** page. Simply click the **Direct to Family Enabled/Disabled** link to the far right of the person’s name to change the status for that individual.

Q: Who is authorized to meet a need of a family directly? ([Watch Instructional Video](#))

A person can be provided with the option of meeting a need of a family directly (and receive only the first name and phone number of the family) only if that individual meets all of the following criteria:

1. Be an “approved member” of an approved church
2. Be specifically enabled by the church to have the option of giving directly to a family
3. Has a skill or item that a family needs
4. Specifically chooses to give (items or services) directly to the family (they can still choose at this point to give through the church or charity to whom the family is assigned, rather than doing so directly to the family)

If the person wanting to help that family does not meet all of those criteria they can only meet the need through the organization that posted the need for that family. They will receive a confirmation email when they sign up to meet that need with the name, address and number of the church or charity that posted the receiving family’s need. The church or charity that posted the need is also notified and the two parties will arrange a way to pick up the item or deliver the service.

Q: What is the range of MTN’s Shared Case Management functionality? ([Watch Instructional Video](#))

- 1) Lists the local families that your organization has helped and what was done for them
- 2) Shows you what assistance families have received from other local organizations, helping prevent anyone from taking advantage of your generosity
- 3) Allows you to post needs of families and broadcast them anonymously to individuals and organizations in your network
- 4) Enables you to schedule families to come back at certain days and times for drives or delivery of items or services
- 5) Provides you the ability to run reports showing the history of assistance provided and needs met/posted for each family or across all families you’ve helped over a certain time period

See MTN’s [User Instructions for Shared Case Management](#).

Q: How does Meet The Need protect personal Social Security Numbers of a family in need that our organization has entered? ([Watch Instructional Video](#))

Meet The Need is designed to ensure the confidentiality of personal information of families you are serving. Under no circumstances are Social Security Numbers (if you enter them) visible nor shared with anyone in the Meet The Need system. Once entered, the SSN is encrypted and will not be seen by any key contacts or users (not even by the organization that entered the family). If a family provides their SSN to a key contact, then it is searchable (if entered in full), but even in that instance the SSN does not appear on the screen.

Q: What are the possible options for how our organization can serve families that MTN can help us manage? ([Watch Instructional Video](#))

Meet The Need's Shared Case Management system provides solutions for all 3 of your possible options for helping a family:

1. Record/view assistance you provided to the family today
2. Post/communicate family needs that you can't meet today to see who can help
3. Schedule a family to come back on a future day (if you can't help them today, and you do not need to post a need because you have a charity drive or delivery coming up and want to schedule the family to come back to receive those items or services)

See MTN's [User Instructions for Shared Case Management](#).

Q: How can I cross check the family to see where else they have received help in the community? ([Watch Instructional Video](#))

On the **Add/View Families** button on your Dashboard (once you add that module to your Dashboard), click **Search Network/Add Family**. Prior to loading an individual's/family's information, you will be asked to enter identifying information to see if they are already in the system. If so, the individual's contact information and assistance/visit history through other local organizations will be displayed. However, you will not see much personal information about that family unless you originally entered them in the system. If the family found through the search is not the same family or if no family is found that matches the data you entered, you may click the button to **Add the Family** and continue entering the family's information.

Q: What reports are available to track our benevolence/case management assistance to individuals/families? ([Watch Instructional Video](#))

Meet The Need's Shared Case Management system provides robust reporting for you to see (and Export to Excel/CSV) activities across each of our 3 service options. You can produce standard and ad-hoc reports for any of the information you collect or post for your families in need. Reports contain filters to narrow your view to date ranges, items given, visit type, etc.

1. Quantity of items or services provided by your organization to families in need by – Click the **Add/View Families** button on your Dashboard and then the **Item Report** tab or **Family Report** tab to run reports by:
  - Date range
  - Value measurement (e.g. dollars, pounds, etc.)
  - Demographics of the families
  - Scheduled visits
  - Cancelled visits
2. Needs Posted and Met - Click the **View Family Needs/Reports** button on your Dashboard

3. Scheduled Visits Reports - Click the **Add/View Families** button on your Dashboard and then the **Scheduled Visits Management** tab, select a shift/time range and view the **Volunteer Schedule**, **Scheduled Visits**, and **Hourly Utilization** on the reports below.

Q: Where can I run reports of the items or services our organization has provided to individuals and families? ([Watch Instructional Video](#))

Click the **Add/View Families** button on your Dashboard and then select the **Item Report** tab to see the categories of items and services you have provided, with quantities for each within any date range you select. This report can be filtered and is exportable.

Q: Can I run a report to show the demographics of the families we serve? ([Watch Instructional Video](#))

Yes, click the **Add/View Families** button on your Dashboard and then select the **Family Report** tab to see the number of items or services of each type you provided to individuals or families by gender, age, race, etc. within any time period.

Q: How do I record a visit and assistance we provided for an individual or family? ([Watch Instructional Video](#))

If your organization helped a family or individual today and want to record all information about the family and services and items you provided, first consider whether or not you have assisted them in the past.

- For an existing family in your database, on the **Add/View Families** button on your web site, click **Search our Families** and use the drop down to select the search criteria. Once you locate the person, click the **Details** button to the right of that family's name, go to the Visits tab and click **Add Current Visit**. Fill out the information in the Wizard for entering the type of assistance you provided, quantity, referrals, faith decisions, reasons why they came in, and other details about the visit.
- For a new family, click **Search Network/Add Family**, run the search for that family in the system, fill out the details about the family on the form, then click **Add Current Visit**.

Q: How do individuals/families become assigned to our organization and appear on our list in Shared Case Management? ([Watch Instructional Video](#))

If you originally entered the information about the family and their household members into the system, they will automatically be assigned to your organization and you will see their personal details, assistance history and need details. If another organization originally entered that person into the system, you can still perform all 3 primary functions for the family using the system – record visits, post needs, and schedule visits.

Q: How do I update a family's profile information? ([Watch Instructional Video](#))

If you are the original organization that entered that family you have access to the family's complete record. On the **Add/View Families** button on your web site, click **Search our Families** and use the drop down to select the search criteria. Once you locate the person, click the **Details** button to the right of that family's name to see all contact, demographic, employment, household and other information you entered about the family.

Q: What do I do if a family is already in the system but is associated with (entered by) another organization and I need to update their profile information? ([Watch Instructional Video](#))

Only the originating organization that entered the family has access to update the family's record due to privacy standards. We recommend that you not duplicate the record, but [contact Meet The Need](#) to request that the originating organization update their records.

Q: Where can I see the history of assistance we have provided to an individual or family? ([Watch Instructional Video](#))



Click the **Details** button to the right of the family's name, then select the **Visits** tab.

Q: How do I post needs for a family and show it to our volunteers and partners to see who can help? ([Watch Instructional Video](#))

If you cannot help the family today, you can communicate their needs (privately, securely and anonymously) to see if someone in your network can help. When you post a need: 1) It shows up on your website and Facebook page (if you have set up those buttons/links), 2) It will also appear on the web sites of local churches and businesses using Meet The Need (if they have the appropriate buttons and have not chosen to hide your needs), and 3) Emails go out to those interested in your organization showing them those needs. Those who want to help the family can sign up through any of those options.

To post a need:

- For a family you have not helped before, click **Search Network/Add Family**, run the search for that family in the system, fill out the details about the family, submit that form, which will then take you directly to the **Search Offers & Post Needs** box.
- For a family already on your account, go to the **Details** button to the right of the family's name, select the **Needs** tab and click **Add Need**.

Before posting a need, Meet The Need requires that you first search the offers currently in the system. There is no reason to post a need if someone has already submitted an offer to provide those goods or services. You must select from all four of the drop down boxes down to the Subcategory level in order to Search Offers and/or Post Needs. In the event that the system locates an offer for that particular need, simply select **Match with this Offer**, which will send out e-mails to the individual who made the offer with contact information for the Key Contact of your organization and instructions for how to meet that need. If no offers are found or if the offer does not match well with the need you want to post, you may click the **Post Need** button to continue with posting the need. The Post Needs form will appear showing the Category and Subcategory information you entered in the Search Offers box, placing the need in the proper Subcategory. Then you may enter the need into the system by filling out information about that need.

You can show the needs of families or individuals on your web site and/or partner sites (or Facebook pages) and let people sign up to help. To learn more about showing needs, see the videos for the [Creating Your Links](#) and [Creating Your Template](#).

Q: How can our organization schedule a future visit (i.e. reservation) for a family or individual to come back to receive services or items? ([Watch Instructional Video](#))

Meet The Need has built the first known collaborative Scheduling System for charity drives. It helps prevent double-booking of families for the same drive at different distribution sites because each organization's Key Contact can see that family is already scheduled elsewhere.

As a Key Contact, you can book families to come back at a later date to receive items on particular dates as follows:

#### **Create Schedule**

- To create the overall schedule and parameters for scheduling families for the drive, click on **Add/View Families**, then select the **Scheduled Visit Management** tab
- Based on the number of volunteers and items available at each distribution site, the drive administrator can set up a calendar specifying for each site:

- Dates available to give out items
- Times available
- How many families can be seen (checked in) each hour

### Schedule Families

- Authorized leaders or volunteers from various schools, agencies, churches, etc. participating in the drive can book a family into an available time slot by:
  1. For Administrators – For a new family, click **Search Network/Add Family**, run the search for that family in the system, fill out the details about the family, submit that form, and then click **Schedule Future Visit**. For a family already in your database, go to **Add/View Families** on your Dashboard and click the **Details** button to the right of the family’s name, then select the **Visits** tab and click on the **Schedule Future Visit** button. ([Watch Instructional Video](#))
  2. For Volunteers (who can’t access your Shared Case Management Dashboard) – Call 813/527-0222 or email [support@meettheneed.org](mailto:support@meettheneed.org) to request logins for your volunteers. Then, pull up <http://www.meettheneed.org/scheduler/> on the device they are using to schedule families, select the distribution site from the drop down list in the top right corner, and have them click **Add New Family** or type in the individual’s name or other identifying information in the text search box. ([Watch Instructional Video](#))
- Before booking a family, each volunteer must search for the family requesting to be scheduled to see if they are already booked at another distribution site. This prevents double or triple booking families at various locations. Searches may be done by any criteria provided by the family, including name, Social Security Number, Driver’s License, address, etc. If the family does not appear in the search, the volunteer may add the new family and enter their details for that family, including household members.
- Then the volunteer can search for available days and times available to book the families at locations where they are authorized to do so and indicate the types and quantity of items they should be given.

### Check in Families

- On the final screen for scheduling families, users print a bar-coded confirmation for the family to take with them and bring back the day of their appointment. This is the family’s reminder of where and when to return and what items/services they will receive. This will also help ensure an accurate record of what items/services are to be provided the day of the appointment.
- On the date the family returns for their visit, volunteers at the distribution site scan the bar-coded sheet that was provided to the family, which will automatically pull up the family’s information and their scheduled visit(s). If the family forgot to bring or lost the bar coded sheet, the volunteer can search for them by name, SSN#, driver’s license, address, etc. using the **Family Search** box. Then they **Check In** the family next to appropriate appointment and confirm the items the family is receiving that day.

Q: Can we enable volunteers to schedule families to come back to receive services or items on a future date?  
([Watch Instructional Video](#))

Yes. Volunteers cannot access your private, secure Shared Case Management Dashboard. However, Meet The Need has developed a separate interface for volunteers to book individuals and families to receive help in the future. First, to request logins for your volunteers, call Meet The Need at 813/527-0222 or email [support@meettheneed.org](mailto:support@meettheneed.org). Then, pull up <http://www.meettheneed.org/scheduler/> on the device they are using to schedule families, select the distribution site from the drop down list in the top right corner, and have

them click **Add New Family** or type in the individual's name or other identifying information in the text search box.

Before booking a family, each volunteer must search for the family requesting to be scheduled to see if they are already booked at another distribution site. This prevents double or triple booking families at various locations for the same drive. Searches may be done by any criteria provided by the family, including name, Social Security Number, Driver's License, address, etc. If the family does not appear in the search, the volunteer may add the new family and enter their details for that family, including household members.

Then the volunteer can search for available days and times available to book the families at locations where they are authorized to do so and indicate the types and quantity of items they should be given.

Q: When we schedule families to come back on a certain day and time, how do we check them in? ([Watch Instructional Video](#))

On the final screen for scheduling families, users print a bar-coded confirmation for the family to take with them and bring back the day of their appointment. This is the family's reminder of where and when to return and what items/services they will receive. This will also help ensure an accurate record of what items/services are to be provided the day of the appointment.

On the date the family returns for their visit, volunteers at the distribution site scan the bar-coded sheet that was provided to the family, which will automatically pull up the family's information and their scheduled visit(s). If the family forgot to bring or lost the barcoded sheet, the volunteer can search for them by name, SSN#, driver's license, address, etc. using the **Family Search** box. Then they **Check In** the family next to appropriate appointment and confirm the items or services the family is to receive that day.

## PERSONAL DASHBOARD

Q: What is a Personal Dashboard and where can find it? ([View Instructional Video](#))

The Personal Dashboard gives quick access to an individual's Meet The Need account. It is a snapshot of their serving activity (pending and completed) as well as access to see the needs of organizations they have joined. Each user of Meet The Need (whether they access it via a church web site or a charity web site) has various levels of access to view and change information in the system depending on what access they have been granted by the churches and charities they have "joined" via the system:

Q: How is access to Personal and Organizational Dashboards controlled? ([View Instructional Video](#))

- Users who are not yet approved by an organization or those who did not register under the name of an organization will see only the left hand side of a Personal Dashboard. They will be able to view and update their own personal giving activity but will not be able to see any Organizational Dashboards or the needs of any particular organization (e.g. the right hand side of the Personal Dashboard).
- Individuals who are not Key Contacts but are an Approved Member of an organization will still only see a Personal Dashboard when they log in to their account, but their Dashboard will show the needs of that organization (on the right hand side).
- Users who are a Key Contact of an organization will see the Organizational Dashboard for that organization first when they log in. They can access their own Personal Dashboard by clicking the **Personal Dashboard** button below the Organizational Dashboard.

Q: What can I do using the Personal Dashboard? ([View Instructional Video](#))

- Edit your personal profile
- Change your email subscriptions
- Connect with your church and local charities to get notifications when they post new needs
- View and edit your commitments to meet needs
- See your past commitment activity
- View and edit your offers to help
- See the current needs of organizations with whom you are an Approved “Member”

Q: Can I take myself off of the “New Needs Posted” email list of a local organization? ([View Instructional Video](#))

Yes. On your Personal Dashboard, click **Manage Email Subscriptions** and uncheck the box next to an organization’s name if you want to be removed from its email distribution lists. This page lists all organizations where you have opted in to be notified when that organization posts new needs (and they have approved you to receive those notifications).

Q: Where do I change my password and contact details? ([View Instructional Video](#))

On your Personal Dashboard, under **Manage My Account**, click **Edit My Profile** to change your contact information, email, password and other information about yourself.

Q: How do I as an individual get connected with a local charity, my church or a ministry within my church to get updated about new needs they post? ([View Instructional Video](#))

- 1) **When Signing up to Meet a Need** – When you commit to meet a need of a local charity, Meet The Need will automatically provide a pre-checked box asking if you would like to receive email updates the next time that charity posts needs.
- 2) **When Creating a Serve Account** – You may be asked to create an account by your church, company or charity or you can do so directly on [www.meettheneed.org](http://www.meettheneed.org) via our [registration](#) link. On the second page of your registration, select the name of your organization from the drop down list.
- 3) **On Your Personal Dashboard** – You can search, select and opt in to receive email notifications from particular organizations (or teams/groups within those organizations) through your Personal Dashboard. If you already have a Meet The Need account, login and on your Personal Dashboard under **Manage My Account**, click the link **Connect with My Church & Local Ministries**. In the third section, select from the drop downs to “Join” a particular organization, which will add you to that organization’s Dashboard as a **Pending Member**.
  - **Join Church** – If you are not already a Pending or Approved “member” of a church in Meet The Need, then you may select one church to “join” so that you may see its needs and be notified when the church posts new needs
  - **Join Ministry or Missionary Organization** – Shows a list of all charities within the search radius you specified above for you to consider “joining” to see their needs and opt in to email notifications when they post needs
  - **Join a Team from \_\_\_\_\_** - If you are an approved member of an organization and they have set up teams in Meet The Need under that organization, then you can see that list of teams on the drop down box(es) and request to **Join** one or more of those teams (to see their needs and opt in to email notifications when they post needs)

Once approved by the organization, you will be able to see their needs, receive email notifications when they post new needs, and/or to be made a Key Contact.

Under **Your Pending Organizations** you will see organizations with whom you have requested an association (to see their needs and receive email notifications when they post new needs) but where the Key Contact(s) of that organization has not yet approved your request.

Q: How many organizations may I “connect” with (to receive email updates when they post new needs) via my Personal Dashboard? ([View Instructional Video](#))

You can only “join” (have an association) with one church or company, but you may connect with as many charities as you would like.

Q: Where can I see what organizations I am currently connected with? ([View Instructional Video](#))

On your Personal Dashboard, under **Manage My Account**, click the link **Connect with My Church & Local Ministries**. You can also view the organizations you are connected with by clicking **Select Other Organization** in your dropdown box next to the Dashboard icon at the top right of your main Dashboard page. Choose one of those other organizations on the drop down list if you would like to see their needs (on the right hand side of your Personal Dashboard).

Q: How can I see a different Dashboard each time when I log in? ([View Instructional Video](#))

Under **Connect with My Church & Local Ministries** on your Personal Dashboard, look under **Your Approved Organizations** to see the list of all organizations where your request for an association has been accepted by the organization.

Click the **Make Primary** button next to an organization’s name if you would like that organization’s Dashboard to be the one you see first every time you log in.

You can also click the **Switch Dashboard** button next to an organization’s name if to you want to go directly to that organization’s Dashboard immediately.

Q: How do I remove my association with an organization? ([View Instructional Video](#))

Under **Connect with My Church & Local Ministries** on your Personal Dashboard, look under **Your Approved Organizations** to see the list of all organizations where your request for an association has been accepted by the organization. If you are not a Key Contact of a particular organization, you may click the **Remove Link** button to end your association with that organization.

If you are a Key Contact of an organization, go to that organization’s Dashboard (using the **View Another Organization’s Dashboard** drop down box next to the Dashboard icon in the top right hand corner of your main Dashboard page), then click **My Account**, and then click **Approved Members**. If you are the only Key Contact of an organization, you cannot remove your association from that organization. If there is more than one Key Contact, have that other person make you a **Regular Member** so that you can remove your Association with that organization on the **Connect with My Church & Local Ministries** page on your Personal Dashboard.

Q: Where can I see my past commitments to meet needs? ([View Instructional Video](#))

On your Personal Dashboard under **My Giving Activity**, see your **Pending** and **Completed Commitment** as well as **Offers** you have made for goods or services:

1. **My Pending Commitments** – A list of your current uncompleted commitments, where you can view, cancel, increase, decrease or complete that commitment by clicking on the appropriate (**Change** or **Complete** button in the **Action** column). You may narrow the list of pending commitments using the date range drop down box in the top left corner of the page.
2. **My Completed Commitments** – A list of your completed commitments, where you either completed it yourself on the **My Pending Commitments** page above, or the commitment was moved to completed status automatically 90 days after the scheduled fulfillment date. You may narrow the list of completed commitments using the date range drop down box in the top left corner of the page.
3. **My Offers** – View and edit any “offers” you made through Meet The Need. An offer may be entered when you have a skill or item to give away, search the Meet The Need database, and no one needs that skill or item. At that point, the system invites you to make an “offer” so that the next time a Key Contact of a local organization tries to post a need for that same skill or item, they will find your offer and can choose to accept your offer, which will send you an email notification along with the contact information of that organization.

Q: How do I view another organization’s Dashboard and their needs? ([View Instructional Video](#))

Click the **Select Other Organization** drop down box (next to the Dashboard icon in the top right hand corner of your main Dashboard page) to select which Dashboard (and needs) you want to view. If you are a Key Contact of that organization, you will see the Organizational Dashboard. If you are a Regular Member (not a Key Contact of that organization), you will see that organization’s current needs on the right hand side of your Personal Dashboard, as follows:

1. **Our Organization Needs** – Volunteer and resource needs posted by that organization
2. **Our Local Families Needs** – Family/individual needs posted by that organization
3. **Our Missionaries & Missions Needs** – Needs of missionaries or mission trips sponsored by that organization

## HIDE/SHOW OTHER ORGANIZATIONS

Q: As a church or company, where can I see who else is using MTN in our local area? ([View Instructional Video](#))

Access a directory of who is registered with MTN at **Settings** and click **Hide/Show Other Organizations** under **Select Needs to Display on Your Website**. This is also where you will have the option to hide any organizations’ needs that you do not want to display to your members or employees.

Q: Can I prevent the needs of certain organizations from showing up on my web site? ([View Instructional Video](#))

Yes. Go to **Settings** and click **Hide/Show Other Organizations** under **Select Needs to Display on Your Website**. This feature is available to churches and companies only. This allows each church or company to focus its members/employees on the needs of the charities or churches they work with. Key Contacts can **Make Visible** or **Make Hidden** the needs of other churches or charities from their main search page by clicking the link next to each organization's name. Clicking **Make Hidden** means that organization’s needs cannot under any circumstances be seen on your web site template. This page lists every church and charity active in Meet

The Need within 25 miles of your zip code (may be extended beyond 25 miles). You can search organizations by name, by type, by newly registered, and by **Visible** or **Hidden**.

Q: Can I prevent members or employees from “joining” certain local organizations through our web site? ([View Instructional Video](#))

Yes. Go to **Settings** and click **Hide/Show Other Organizations** under **Select Needs to Display on Your Website**. If you check the box to **Prevent Members from Joining Hidden Ministries** then the names of the organizations you “hid” on this page will not appear on the list of local organizations your members/employees can connect with through their Personal Dashboards. Therefore your members/employees will not be able to “join” those organizations through your web site to see their needs and get email updates when those organizations post new needs.

Q: Can our organization by default prevent the needs of new organizations that register with Meet The Need from showing up on our web site. ? ([View Instructional Video](#))

Yes. Under **Settings** if you click **Hide/Show Other Organizations** under **Select Needs to Display on Your Website**, if you set the **Default Need Visibility** to **Not Visible** then new organizations registering with Meet The Need will automatically be set to **Hidden** on this page and their needs will not appear when you show all local needs.

If you have set the **Default Need Visibility** to **Visible** but wish to prevent the needs of certain organizations from appearing on your web site, we recommend occasionally reviewing the list of organizations who have joined Meet The Need in your area in the past 5 days, past 15 days, etc. using the **Joined any Time** drop down on this page.

## CREATE TEMPLATE

Q: What is a template and why do I need one? ([View Instructional Video](#))

You may run all of Meet The Need's software through your organization's web site and make it all look exactly like your organization's site by creating a template for your Meet The Need account. A template is the “wrapping” (header and footer) that is copied from your website to make all of your MTN search pages (buttons/links) appear seamless to the volunteer. Once you have built your template, all of your links showing specific types of needs will appear within your web site template, and you simply attach those links to buttons you add to your web site to let your members and visitors to “shop” on your web site for opportunities to serve at your organization or in the community . Through your template and associated links, you have complete control of what options, screens, and types of needs users will be able to see through your web site.

Q: Do I need a webmaster to create my template? ([View Instructional Video](#))

No, it is not necessary to involve your webmaster if you use a basic template. MTN has made it easy for you to create a template to show your needs on your web site. With a simple basic template (a plain grey one is initially created for you) you can update the colors, menu items and logo to look approximately like your web site.

However, if you want an advanced template, or exact replica of your web site, you can follow the written and [video instructions](#) on the **Help** button on the **Create/Edit My Template** (under **Settings**). The process involves simply copying your HTML coding from your header and footer of your website. However, you will likely need assistance from your webmaster to ensure every page of your sign up process looks good and works well across all browsers.

You can access both the Basic and Advanced options by going to **Settings** on your Dashboard and clicking the **Create/Edit My Template** button underneath the **Customize MTN for Your Website** header.

Q: How do I create my own template to show needs on my website? ([View Instructional Video](#))

Go to **Settings** on your Dashboard and click **Create/Edit My Template** under **Customize MTN for Your Website**. You have three options for creating your template which vary from simplest to most difficult to implement. None of these three options should take more than 1 hour to complete.

- **Basic** tab (10 minutes) – Users without any technical expertise can use this feature to create an approximation of your web site with your background colors, logo and menu options.
  - **Outer Background** – Choose a color from the palette for the background outside of your frame
  - **Inner Background** – Choose a color from the palette for the background inside of your frame
  - **Menu Background** – Choose a color from the palette for your menu bar
  - **Main Text Color** – Choose a color from the palette for your text (besides the menu)
  - **Menu Text Color** – Choose a color from the palette for your menu text
  - **Fonts (Main)** – Choose a font for your text (besides the menu)
  - **Fonts (Menu Bar)** – Choose a font for your menu text
  - **Edit Menu** – Add the names and links of each menu item from your web site to your template (so users can click from your template back to the links on your web site)
  - **Edit Logo** – Choose and upload your organization’s logo file from your computer
- **Advanced** tab (1 hour) - Create nearly an exact replica of your web site background, header and footer. You should involve your organization’s webmaster or someone with experience working on websites and comfortable with HTML to help you. The next screen will ask for two blocks of HTML:
  - 1) Header - This is the HTML above the main content area of your website. You may include everything from the opening <html> or <!doctype...> tag down to the main <div> or table cell that opens the content area of your website. This will likely include most of your javascript and css references, menus, banner images, etc.
  - 2) Footer - This is the HTML below the main content area of your website. Include everything from the </div> or table cell that closes your content area down to the closing </html>. It will likely include the copyright text as well as any images and text you have at the bottom of your website.

Most website content areas are adequate, but ideally they would have:

- A minimum width of 700 pixels (about 7-8 inches on a typical monitor)
- At least partially based in HTML (not purely Flash or Silverlight)
- Not inside a frameset

After you supply this html code you’ll be given an opportunity to preview the template and fine tune as needed until you are comfortable with the results.

- **iFrame** (1 hour) – An iFrame removes the Meet The Need web site address from the URL line for an even tighter integration. iFrames are also useful when an organization changes the header, footer or menu options on their web site often. Implementing an iFrame requires involvement by your IT staff. Below are high level integration instructions for your IT department to help them get started. Contact Meet The Need at [support@meettheneed.org](mailto:support@meettheneed.org) if you need more detailed instructions.
  - Create a template that is smart enough to recognize if it is inside an iframe and (if so) strips out header and navigation, leaving only the main content.
  - Create a dedicated page on your website that has an iFrame that points to Meet The Need with your Meet The Need link and parameters.



- The main downside of iFrame implementations is the height and scrolling issue within the iFrame. The content in Meet The Need varies in length and so there is no single height that is ideal. If the iFrame is made too tall then it degrades the user experience by making the outer page scroll too far. If the iFrame is made too short then the user needs to scroll excessively inside the frame. The ideal size is around 700px+ wide and around 600-800px tall depending on the size of your website content above the iFrame.

Q: How do I update my organization's template if our website has changed? ([View Instructional Video](#))

All organizations change their websites occasionally, so we provide a way for you to update your templates quickly. Go to **Settings** on your Dashboard and click **Create/Edit My Template** under **Customize MTN for Your Website**.

If you use an Advanced template and you know HTML coding, make the adjustments to your current advanced template and copy and paste the code to reflect your new header and footer and menus. Test the sign up process and adjust as necessary to ensure all buttons and links work and all pages appear appropriately in each browser.

If you use a Basic template, click the **Basic** tab and update the colors, menu items, text fonts, logo, etc. to match more closely with your new web site.

When working with Basic or Advanced templates, you can check to see what your template will look like by simply clicking one of the links provided to you by Meet The Need via email or on your Dashboard (the **Link** button appears for each module on your main Dashboard page).

Q: How can I remove [www.meettheneed.org](http://www.meettheneed.org) from the URL of our links and buttons? And what do we do if we change the header or footer of our web site often? ([View Instructional Video](#))

Use an iFrame if you want to remove the Meet The Need web site address from the URL line for an even tighter integration. iFrames are also useful when an organization changes the header, footer or menu options on their web site frequently.

Implementing an iFrame requires involvement by your IT staff. Below are high level integration instructions for your IT department to help them get started. Contact Meet The Need at [support@meettheneed.org](mailto:support@meettheneed.org) if you need more detailed instructions.

- Create a template that is smart enough to recognize if it is inside an iframe and (if so) strips out header and navigation, leaving only the main content.
- Create a dedicated page on your website that has an iFrame that points to Meet The Need with your Meet The Need link and parameters.
- The main downside of iFrame implementations is the height and scrolling issue within the iFrame. The content in Meet The Need varies in length and so there is no single height that is ideal. If the iFrame is made too tall then it degrades the user experience by making the outer page scroll too far. If the iFrame is made too short then the user needs to scroll excessively inside the frame. The ideal size is around 700px+ wide and around 600-800px tall depending on the size of your website content above the iFrame.

Q: My Dashboard looks like it's on my web site template and not all the tables and pages are aligned correctly. What can I do to fix the issue? ([View Instructional Video](#))

We recommend always working with your Dashboard on the [www.meettheneed.org](http://www.meettheneed.org) home page template, not on your web site template. If you are accessing your dashboard through your template then you will lose some of the functionality of your Dashboard and the appearance of many administrative pages will be distorted.

To get off of your template and back on Meet The Need's template for managing your account:

1. Close out your browser entirely, meaning closing all windows open for that browser
2. Go to [www.meettheneed.org](http://www.meettheneed.org) and log in
3. If necessary, clear your browser's history, cookies and cache
4. If necessary , refresh your Dashboard page after you log back into your account on [www.meettheneed.org](http://www.meettheneed.org)

After these steps, your Dashboard should appear like Meet The Need's website and not your template.

This issue does not occur for your volunteers because your template is optimized for all of the pages they will use to sign up for needs and manage their commitments. Only your Key Contacts (administrators) can access your organizational Dashboard and manage your account.

## EVENTS

Q: What are the primary capabilities of Meet The Need's event module? ([View Instructional Video](#))

Our Event Management system allows you to...

- create your own event from your Meet The Need Dashboard
- create customized categories of goods and services needed for the event
- post volunteer/goods needs into those categories you created
- track volunteers and goods conveniently with comprehensive reports
- enable users to search and adopt needs quickly and easily

See MTN's [User Instructions for Event Module](#).

Q: How do I create events using Meet The Need? ([View Instructional Video](#))

On your Dashboard, go to the Event module and click **Create Event**. Type in the name, description and upload a logo for your event (if applicable). Determine what categories of needs you will have for your event (e.g. projects, locations, job skills, or people groups) and enter those category names. After you have created your event you will be taken directly to your Event Summary page to post needs for the event (under each category you created). On that same page, you can edit the event and get your link (to show needs and take signups for your event). An event Dashboard is also set up for you when you create the event to see commitments and reports for your event, which you can access by clicking on the name of the event on the Event Summary page or by selecting the event from the **Select Other Organization** drop down next to the **Dashboard** icon on the top right of your Dashboard.

Click here to read [MTN Quick Start Guide for Events](#)

Q: When should I use the Event Management module rather than Volunteer Management? ([View Instructional Video](#))

We recommend using the Event module (versus Volunteer/Resource Management system) if needs are for a specific, well defined time period and not expected to be ongoing. Also, the Event module works well if you

would like to show search results by day and shift (for each day) with simple check boxes next to each time slot.

Q: Can I create my own categories of need based on the types of roles, items, projects or locations for my event? ([View Instructional Video](#))

You can create **Categories** for the types of needs you want to post (e.g. by location, by skills, by people groups being served, etc.) for both volunteer and/or goods needs. How you choose to set up subcategories depends on how your event is organized and how you foresee volunteers predominantly searching for your needs. See examples below.

- By Location: work site, site 2, site 3, etc.
- By Skills: parking, food, entertainment, etc.
- By People Groups: elderly, children, single parents, etc.

Q: Can I add a logo to my event? ([View Instructional Video](#))

Yes, you can add a logo to your event that will show up on your search page with your event needs. The logo will also enable your event to be easily recognized on MTN pages appearing on other web site that show local needs and events. When create your event, you will see an **Add Logo** option to choose an image file to upload from your computer. Square images work best and images larger than 68x68 pixels will be scaled down.

Q: Should I reuse my old event from last year or create a new one? ([View Instructional Video](#))

Do not reuse an old event from a prior year and attempt to update the information. Doing so will assign people who signed up for this year's event to last year's event. In other words, if you change the dates of shifts that took place last year to this year, commitments will be blended across the two years.

We recommend simply copying information from the old event that you need to create the new event. You can access your past events by selecting **Inactive** on the **Status** drop down on your **View Events & Reports**.

Q: How do I get my link to show the needs for my event? ([View Instructional Video](#))

When you create a new event, Meet The Need automatically generates the link you will need to show the needs of that event and allow people to "shop" those needs and sign up to meet them. You can access your event link(s) by clicking on **View Events & Reports** on your Dashboard. To the right of each event, click the **Create Link** button, copy the URL provided, and attach it to the event button on your website (telling people to sign up by clicking that button). You can also email the link to your database and event partners.

Q: Where can I see all of my current events? ([View Instructional Video](#))

View all of your events by clicking on **View Events & Reports** on your Dashboard. On that page, you can:

- See the name of contact details for each event's **Key Contact** person (authorized to see the event Dashboard, reports and post needs for the event)
- **Deactivate** an event so that all of its needs will no longer appear on any web sites by clicking **Active-Click to Deactivate**
- Click the **Edit** button to the right of any event to edit the specifications for that event (e.g. name, description, logo, categories). All revisions will immediately be reflected on your organization's web site and the web sites of all other local organizations that choose to display that event.
- Use the **Reporting** drop down to see **Essential**, summary level, data or **Extended** more complete information about your events. Selecting **Extended** data increases the load time of that page but shows more key metrics about commitments to meet your events' needs. That same information is available in detail on the Event Dashboard.

Q: Where can I post needs for all of my current events? ([View Instructional Video](#))

There are two places where you can post needs

- **Post Need Button on Event Summary page** – Once you have created your event and set up your categories, click the **View Events & Reports** button on your Dashboard and click the **Post Need** button to the right of the name of event.
- **On your Event Dashboard** – Go to your event Dashboard by either:
  - Selecting the name of your event from the **Select Other Organization** drop down (which is located to the left of your Dashboard icon in the top right hand corner of your Dashboard). After you choose your event from the drop down, click the **Post Need** button on that event’s Dashboard.
  - Clicking on the name of your event in the left column of the table on the **View Events & Reports** page

Q: How can I access the Dashboard for the event and what can I do using the Dashboard? ([View Instructional Video](#))

Access the event Dashboard by either:

- Selecting the name of your event from the **Select Other Organization** drop down (which is located to the left of your Dashboard icon in the top right hand corner of your Dashboard)
- Clicking on the name of your event in the left column of the table on the **View Events & Reports** page

On your event Dashboard, you can post needs for your event or view reports showing all of the commitment activity for the needs you posted for that event.

Q: What reports are available for my events? ([View Instructional Video](#))

As people sign up to help at your event, you can see all of the information about their commitments on your dedicated Dashboard for the event. Access the event Dashboard by clicking on the name of the event on **View Events & Reports** button on your Dashboard. The first three sets of reports relate directly with the need (**Open**, **Filled**, and **Expired Needs**), which shows all data (which is fully exportable) about specific commitments made by individuals and groups along with their contact information. The last set of two reports relate directly with the individuals who have adopted needs (**Pending and Completed Commitments**).

Q: How can I advertise my special event? ([View Instructional Video](#))

- **“Our Needs” or “Our Events” button on your website** – If you currently have a “Our Needs” or “Our Events” button on your website with a MTN link attached showing all of your needs, your event will be displayed there automatically when you create the event
- **Dedicated Event button on your website** – Copy your event link from the **Create Link** button on **View Events & Reports** and attach the URL to a dedicated event button (that you create) on your website
- **Email** – MTN’s links are easy to imbed or hyperlink to text in your emails, newsletters, etc.
- **Social Media** – You can easily cut and post those links into your social media sites/postings

Note: New needs posted emails do not go out automatically to your entire MTN database, but only to “Approved Members” who you have assigned specifically to the event.

Q: Why can’t I delete or edit my event category title? ([View Instructional Video](#))

If your event currently has active needs posted within a category, you cannot delete the category or edit its name. However, if you make all needs within that category **Inactive** you can then edit or delete your category title as long as no commitments have been made for a need posted within that category.

Q: Can I show all my events on a single link? ([View Instructional Video](#))

Yes, from your event module on your Dashboard, click the grey **Link** button in the upper right corner of the box. Copy and attach the link to a button (you create) to display your events on your website or simply email the link to your database.

Q: What types of needs can I post for my event? ([View Instructional Video](#))

Once you create your event and categories, you can post needs for items of for volunteers at any location at any time (within those categories). Volunteer needs can include **One-Time** needs with only one shift. Or you can post **Open-Ended** needs which have no set date (i.e. needed anytime). You can also post **Recurring** needs which have multiple regular occurrences on either a daily, weekly or monthly basis.

For each need, you can also select a **View Status** of **Public** (makes the need available to be seen by the Meet the Need network), **Semi Private** (show it only on your web site), or **Members Only** (restrict it to only be seen by your Approved Members; e.g. background checked individuals).

Q: Are reminder emails send out to those who volunteer for my events? ([View Instructional Video](#))

A confirmation email is sent immediately. Reminders are sent at 21, 7, and 1 day prior to the **Needed by:** date. Recurring volunteer needs only receive a confirmation email (no reminders).

Q: How can we change the location of an event from our location if it is not taking place at our office address, which is what is listed under our **Edit Organization Profile**? ([View Instructional Video](#))

First, go to the event's Dashboard:

- by selecting the name of your event from the **Select Other Organization** drop down (which is located to the left of your Dashboard icon in the top right hand corner of your Dashboard)
- or by clicking on the name of your event in the left column of the table on the **View Events & Reports** page

Then, click **My Account** and then **Edit Organization Profile** and change the address shown there (it is set automatically as the parent organization's address).

If there are multiple event sites, we recommend indicating in the description for each need the address of the applicable work site or drop off site.

## **INTERNATIONAL MISSIONS**

Q: What basic functionality is available through MTN's missions module? ([View Instructional Video](#))

Communicate needs for your missionaries or international mission work, within a country or overseas. Broadcast upcoming mission trips and the skills and resources needed. Take signups on your website or Facebook page and through the web sites of partner organizations. Even get help for individuals or groups who are serving as missionaries "in the field".

See MTN's [User Instructions for International Missions](#).

Q: Does Meet The Need have solutions for international Disaster Relief or domestic missions projects?

To find out more about Meet The Needs customized solutions, including Disaster Relief and domestic missions, contact Meet The Need at 813/527-0222 or [info@meettheneed.org](mailto:info@meettheneed.org).

Q: How do we load in a missionary and post their needs? ([View Instructional Video](#))

To add a need for a missionary who is not already on your Dashboard:

- Click **Add Missionary** on your Dashboard and complete the form.
- Post the services or items needed by that missionary and family. Use the **Help** button on the Search Offers and Post Need page for instructions for how to complete the process of posting a need. You can post in any major city in any country in the world. You can also attach waivers, surveys or any other information within your postings. Meet The Need converts your links to documents into the words “Click Here” that is a hyperlink and will take users to your document.

To add a need for a missionary already in the system, to edit information about your missionaries, or to view the current needs of your missionaries:

- Click **View Missions Needs/Reports**, and click **Missionaries & Missions**
- Select the **Details** button to the right of that missionary, scroll to the bottom of the page and click the **Add Need** button. Use the **Help** button on the Search Offers and Post Need page for instructions for how to complete the process of posting a need.

Q: How do we load in a need for a mission trip? ([View Instructional Video](#))

Click the **Add Missions Opportunity** button on your International Missions module box on your Dashboard. Using the drop downs on the box on the Search Offers and Post Needs page, select the types of skills or items needed, which correspond to the typical needs of missions projects and trips. Use the **Help** button on the Search Offers and Post Need page for instructions for how to complete the process of posting a need.

Q: Where do I get a link to show my mission trip and missionary needs? ([View Instructional Video](#))

There are three ways to get the link(s) to show your missionaries and missions trips needs on your web site or on your partner’s web sites:

2. When you registered with Meet The Need, if you selected the International Missions module then you were emailed the link to show your missions needs.
3. You can also retrieve that link now by clicking the grey **Link** button in the top right hand corner of the International Missions module on your main Dashboard.
4. Retrieve your links and customize those them via the Link wizard under **Settings** and **Create / Manage My Links** on your Dashboard.

Q: How can I share our missions and missionary needs with others? ([View Instructional Video](#))

- **Your Web Site** – Show all needs for your missions efforts on one button or on separate buttons for each trip or country. Attach the link(s) to buttons on your web site for particular missions trips or for your missionaries for people “shop” those needs and sign up to help.
- **Facebook Page** – Post and display the resources and skills needed for each missionary and mission trip on your Facebook page (click to read our [Facebook Tab Set Up Instructions](#)).
- **Partner Sites** – Send the links to partner organizations who you want to see and share your missions needs with their constituents. They can send the link(s) out via email/newsletter or attach the link(s) to button on their web site.

There are three ways to get the link(s) to show your missionaries and missions trips needs on your web site or on your partner’s web sites:

1. When you registered with Meet The Need, if you selected the International Missions module then you were emailed the link to show your missions needs.
2. You can also retrieve that link now by clicking the grey **Link** button in the top right hand corner of the International Missions module on your main Dashboard.
3. Retrieve your links and customize those them via the Link wizard under **Settings** and **Create / Manage My Links** on your Dashboard.

Q: Can I give my missionaries in the field access to post their own needs for our volunteers or members to see? ([View Instructional Video](#))

Yes, but first that missionary must have Key Contact (administrative) access to a Dashboard in order to post their own needs. We recommend setting up a missions team under your organization's main Dashboard and making your missionaries Key Contacts for that team.

To set up a mission team, go to **My Teams** under **My Account** on your Dashboard and click **Add a New Team**.

To assign a missionary as a Key Contact for that team:

1. Have them first register on this [link](#) under the name of your organization (in Step 2)
2. Go to your Dashboard and click **My Account** and **Approved Members** under **Member Status**
3. Check the box next to that individual's name on the list and click the **Assign \_\_ Members to Teams** button, select the missions team from the drop down list, and then click **Assign**
4. Then, switch Dashboards to the team you created (via the drop down box in the top right corner of your Dashboard next to the house icon)
5. Go the **Pending Members** page of the team, approve that individual and make him/her a Key Contact via the drop downs to the far right of the person's name.

The next time they login, that missionary will have a dedicated missions dashboard to post/manage their needs and see who has agreed to meet each need.

Q: How can I set up a separate missions team for our missions leader to manage and communicate all of their needs? ([View Instructional Video](#))

You can form teams (groups of individuals) under your organization who have an interest in your missions efforts and/or are properly credentialed to serve in a specialty overseas. Using **Teams** (under **My Account**) will allow you to communicate missions needs only to certain individuals (those who are assigned to that team). When the team leader posts needs for that role or skill set via the mission team's dashboard, those pre-qualified individuals on that teams will receive automated email notifications. For needs posted as **Private**, team members will have to login to prove they are members of the team before seeing the needs. Team leaders will have a dedicated dashboard for their team to post/manage needs, organize team members, and see who has agreed to meet each need.

To set up a mission team, go to **My Teams** under **My Account** on your Dashboard and click **Add a New Team**.

To assign people to the missions team:

1. Have them first register on this [link](#) under the name of your organization (in Step 2)
2. Go to your Dashboard and click **My Account** and **Approved Members** under **Member Status**
3. Check the box next to that individual's name on the list and click the **Assign \_\_ Members to Teams** button, select the missions team from the drop down list, and then click **Assign**

4. Then, switch Dashboards to the team you created (via the drop down box in the top right corner of your Dashboard next to the house icon)
5. Go the **Pending Members** page and approve each individual as a **Regular Member** or **Key Contact**

If you make someone a Key Contact on the team's Dashboard (via the drop downs to the far right of the person's name), the next time they login, that person will have access to the dedicated missions dashboard to post/manage missions needs and see who has agreed to meet each need.

Q: Where can I find reports about my mission trip and missionary needs and commitments to meet those needs? ([View Instructional Video](#))

You can see every need you have posted and can edit the details via the **View Missions Needs/Reports** button on your Dashboard. To view or edit information about your missionaries or to view the current needs of your missionaries, click **Missionaries & Missions**, then select the **Details** button to the right of that missionary. For all missions needs (mission trips and missionaries) use the **Open/Partially Filled Needs** reports, which will show you who has agreed to meet each of the needs you have posted. Click the **Filled Needs**, **Expired Needs**, **Pending Commitments** and **Completed Commitments** buttons to run historical reports showing commitment details and key statistical data across all of your mission projects. At any time, you can export the results of the reports you run to a CSV file.

## LEARN MORE

Q: How can I stay in touch on enhancements and changes to the MTN software?

- [User Webinars](#)
- Newsletters (you joined the mailing list when your organization registered)
- [Meet The Need Blog](#)
- [Twitter](#)
- [Facebook](#)
- [LinkedIn](#)
- [Meet The Need Web Site](#)

Q: Where can I find "help" resources for Meet The Need?

A number of Help resources are available to you through MTN:

- Series of 8 Start up ("MTN in a Minute") training emails you received when your organization registered
- [Frequently Asked Questions](#)
- **Help** button at the top of every page within each module, which includes:
  - Training Video for that functionality
  - Users Guide for that functionality
- **Training** icon at the top of your Dashboard, which takes you to a complete [Training Video Library](#)
- Blue **Help** button below your main Dashboard, which will take you to a resource page that includes:
  - Quick Start Guides for each module
  - [Frequently Asked Questions](#)
  - [MTN Webinars](#)
  - MTN Best Practices documents
  - [Contact information for MTN Member Services](#)



## **COST**

Q: What are suggested donation amounts to the Compassionate Impacts Project?

To help cover our operational costs of providing you with Meet The Need (MTN) and to support our project:

- Churches:
  - Less than 500 weekly attendees - \$500
  - 500 – 1000 weekly attendees - \$1,000
  - 1,000 – 2,000 weekly attendees - \$1,500
  - 2,000+ weekly attendees - \$2,500
  
- Non-Profits
  - Less than 1000 served annually - \$500
  - 1000 – 5000 served annually - \$1,000
  - 5,000 – 10,000 served annually - \$2,500
  - 10,000+ served annually - \$5,000

Q: Will our functionality ever be limited if we cannot donate to Meet The Need?

No, we are a ministry organized as a 501(c)3 Public Charity, not a business. Our heart is to see God glorified and more help and hope brought to struggling families. Bringing together churches and charities to meet the needs of local ministries, families and missionaries in Jesus' name requires a no-cost solution. We do not want any organizations to be precluded from using MTN due to lack of funding. Therefore, we will not restrict access to MTN depending on your ability to donate.