HELPFUL VILLAGE | SUPPORT & RESOURCES

Helpful Village Manual

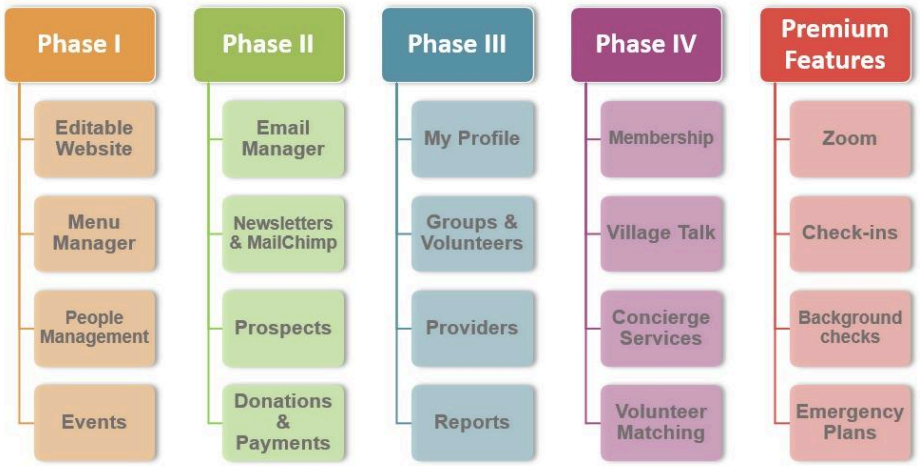
Find the answer. Get back to your work.

Welcome to Helpful Village! This is an extensive guide that helps you learn all features of the Helpful Village software.

🏗️ Building Your Village in Phases

Flexible navigation: You are free to explore all sections at any time.

Recommendation: Based on our experience, for new Villages, it is most effective to implement the phases in the suggested order.



Use this manual to find the right instructions for a specific task. Each question links to a detailed tutorial in the Helpful Village Help Center, where you can find step-by-step guidance and supporting visuals.

01 SEARCH BY KEYWORD

Use Ctrl + F on Windows or Command + F on Mac to search for a task, feature, or keyword

02 BROWSE BY TOPIC

Use the clickable table of contents to browse sections and select the question that matches what you need to do.

NEED MORE HELP?

Visit the Helpful Village Help Center: support.helpfulvillage.com/hc/en-us
If you can't find what you need, submit a support request: support.helpfulvillage.com/hc/en-us/requests/new

Helpful Village Manual

Quick reference directory

Browse by phase and topic. Select a question to open its linked resource when a link is available in the source manual.

Phase I

Editable Website

- Website Building Action Plan
- How to create an editable page?
- How to edit an editable page?
- How to clone an editable page?
- How to create a new editable page, add pictures and video
- How to add documents to editable pages?
- Is it possible to edit the source code of an editable page?
- How to add a slideshow to an editable page
- How to format columns with a horizontal design?
- How to upload your logo + header?
- How do I remove the icons from the navigation bar?
- How to edit the Member Application Form?
- How to edit the Volunteer Application Form?
- How to improve your website SEO?
- Create albums to the photo gallery before publishing to Menu Manager
- How to add albums to the Photo Gallery?
- How to add photos to an album in the Photo Gallery?
- How to add a photo gallery for public viewing?
- How to add a photo gallery for private viewing?

How to create a blog topic?
How to edit an existing blog topic?

Menu Manager

Public Menu vs Private Menu
How to modify the Public menu bar?
How to modify the Private menu bar?
How to add a Main Menu in the Menu Manager?
How to add a submenu and change the order?
How to link an editable page to a menu or submenu?
How do I delete pages from the menu manager?
Website Default Breakdown?

People Management

How to access your new account?
Password Requirements
Forgot your password?
Which are the options on your profile?
How to add a person?
How to send password instructions to a person?
Adding Villagers – Members, Volunteers And Donors
Adding affiliates to organizations
How to clean up your database? Duplicates / fake users
How to compare two profiles of a given person?
Rights management, Admin roles and emails notifications
What are the rights management for an ADMIN?
What are the rights management for a SERVICE REQUEST MANAGER?
What are the rights management for an EVENTS MANAGER?
What are the rights management for a WEB PAGES MANAGER?

What are the rights management for a PROVIDERS MANAGER?
What are the rights management for a TREASURER?
What are the rights management for a MEMBERS MANAGER?
What are the rights management for a SERVICE EVALUATIONS MANAGER?
What are the rights management for a PROSPECTS MANAGER?
What are the rights management for an EMAIL TO GROUPS MANAGER?
How does the “Unable to Login” check-in work in Rights Management?

Events

How to create a New Event?
How to cancel an event?
How to delete an event?
How to clone an event?
How to set up an external event registration link?
How to create a zoom event with the Zoom Module?
How to create a zoom event with version 1?
How to clone a zoom event?
How to register a participant to an event?
How to mark participants as present for an event?
How to export participants of an event to a file?
What are the "RSVP Required" options?
When do the "Join Online Meeting" and "Add Me to the Waiting List" buttons appear?
How to create an Attendance Mailing List?
How to sync participants with MailChimp for an event?
How to create a new event category?
How to manage and customize event categories?

How to delete an event category?
Events Visibility and Privacy
Filtering events - Events List and Events Calendar
How to add an event with tickets for sale?
How to promote a Village event on Facebook?
How to receive donations for an event?
How to get an event donations csv for an event?
How to populate a waiting list for an event?
How to post a comment on an event?
How to connect local organizations' event feeds to your HV platform with your RSS?
How to create an "Upcoming Events" box which displays events right on your homepage?
How to add National Events to your Village calendar?

Phase II

Email Management

What is an email template?
How to create a new email template?
How to edit an email template?
"Volunteer Welcome" email template?
How to delete an email template?
How to clone an email template?
How to add colored boxes to Email templates?
Which merge fields (variables) may you use in an email template and how to insert merge fields from the text editor?
How to set up the Upcoming Weekly Events email?
How to send a message with HV Email Messenger?

Adding Attachments to Your Email Messages

How to embed a video into Email Messenger?

What is a web template and how to insert a web template from the text editor?

Newsletters & Mailchimp

What is Mailchimp and WHY should you use it with HV?

How to set up your Mailchimp account?

How to send an email through MailChimp?

What to verify if users think they are not receiving emails

How to create a Mailchimp resubscribe signup form

How to resubscribe a person that unsubscribed from MailChimp?

How to resubscribe a user that was accidentally unsubscribed by an Admin

What is MailChimp synchronization?

How to synchronize with the MailChimp button?

Expiration Reminder Tutorial

Mailchimp Message Segmentation: How to Exclude or Combine Groups and Tags

How does HV facilitate your Outreach Efforts to targeted audiences?

Outreach Efforts Action Plan Recommendations

Description of are the group categories

What are MailChimp tags on the User Admin Profile?

How to create a new tag?

How to add a tag to a person?

How to add a person to a Mailing Tag List?

Why create an Outreach Marketing Campaign?

How to create and send a campaign message through MailChimp?

How to unsubscribe from MailChimp?

Prospects

The Prospect Process

How to create a prospect task?

Where can you see the upcoming tasks of a person?

How to edit or add a Prospect Source?

How to delete a Prospect Stage or a Prospect Source?

How to edit or add a prospect stage?

Donations & Payments

Why does Helpful Village connect with Stripe?

How to set up Stripe payments?

How to set up Stripe Donations?

How to register an organization?

How to add a donation?

How to refund a donation?

How to set up a monthly donation?

How to cancel a donation subscription?

How to match a donation to an Organization?

How to add an affiliate to an Organization?

How to delete an affiliate from an Organization?

How to upload a Thank You Donation Letter Template?

How to download a Donation Thank You letter?

How to add a Fundraising Campaign?

Which are the options to pay a Helpful Village invoice?

Phase III

My Profile

How to complete your profile?

How to change your profile photo?

How to write your biography?
Who can see your profile?
How to apply to be a volunteer?
How to tell if a member or volunteer is active vs inactive?
How to archive, remove or delete a user from your village?

Groups & Volunteers

Process for volunteer
How to add a Volunteer?
How to screen a volunteer?
How do I Request Background Checks for Volunteers?
How to Request Volunteer Donations for Background Checks
How does a member become a Volunteer?
How can a volunteer report hours?
How to check volunteers availability by volunteer services and by days?
How to Stop an Active Volunteer?
How to handle the death of an active volunteer?
What is the "Groups" function for?
How to create a new group?
How to edit a group?
Add or update volunteer groups?
How to edit a "Volunteer Service group" name?
How to add a person to a group?
How to add people from a different group?
How to create mailing labels?
How to add or remove a person and synchronize to a group with MailChimp?
What is a group managed only by ADMIN?

CSV Information When Exporting Groups?
How does the Safe Service Clearance feature work?

Providers

How to add a Service Provider?
How to screen a New Provider?
How to delete a provider?
How to add a New Provider Category?
How to add a New Provider Subcategory?
List of Provider categories and subcategories
How to edit provider service?

Reports

What is a Volunteer Services by Categories report?
List of Reports
How to download a CSV Report by tags?
What is an Impact Report?
What is a Village Board Report?
What is an Active Members report?
What is the Expiring Members Report?
What is a New Members Report?
What is a Renewing Members report?
What is a Members Birthdays report?
What is an All Former Members report?
What is an All Members report?
What is a Members Directory Report?
What is a Missing Membership Payments report?
What is a Members Without Local Village report?
What is a Volunteers Activity Report?
What is Active Volunteers report?

What is a Screened Volunteers report?
What is an Unscreened Volunteers Report?
What is an On Vacation report?
What is a Volunteers by Category report?
What is an Expiring Driver Licenses report?
What is an Expiring Insurances report?
What is an All People Report?
What is an All Archived People Report?
What is an All Groups report?
What is Notes on Personal Profile report?
What is an Organizations report?
What is a Providers Report?
What is the Providers Review Steps report?

Phase IV

Memberships

Process for a member
Member Manager monthly tasks
How to set up Membership settings? - Member Manager
How to activate and to customize auto templates? - Member Manager
How to create a New Member?
How to Associate Members?
How to create a Household Membership?
How to set up two household members with a Shared Email?
How to set more than one Associated Member within a Household Membership?
Should we offer Quarterly Membership Payments?

Process for a member
How to renew your membership online, one-time payment?
How to renew your membership online, set up your membership monthly payments?
How to update your credit card for monthly payments?
How to renew your membership with ACH (Automated Clearance House)?
How to configure your monthly payments with ACH?
How to cancel your monthly subscription?
How to delete your bank account information?
How to make a new payment?
How to refund a payment?
How does an Admin or a Members Manager enter a one time payment for a membership?
How does an Admin or a Members Manager enter a monthly payment for a membership?
Which links may a Member Manager send directly to a member?
How to configure Membership Types?
What are the Membership Status options?
How to proceed when a member is deceased?
What is the Members Directory?
Formal Retention Plan for Members
How to activate Hub and Spoke?
How does the Pay tab work?
How to Upload Templates for Tax Deductible Donation Report?

Village Talk

What is Village Talk?
What is the Interest Groups Catalog?
How to create, like and comment on a Post?

How to create a New Interest Group by an ADMIN in Village Talk?
Email Notifications for Village Talk
How to add members to Interest Groups?
How to moderate Comments in Village Talk as an ADMIN?
Interest Groups Exclusively for Active Volunteers

Concierge Requests

How to Split a Service Request?
How to produce a report of Volunteer Activity for an individual (services, hours, mileage)?
"Unsubscribed from volunteer notifications" VS "Vacation period for volunteers"
How to create a new Service Request?
How to clone a Service Request?
How to permanently delete a service request?
How to send service requests via email messenger?
How can members view their own service requests?
How to add or edit a Service Group?
How does Volunteer Matching work?
How to view member/volunteer information from service request?
What do the colors on the Service Request Calendar Mean?
How to create a Village Builder Request?
How to match a Preferred Provider with a Service Request?
How to add a volunteer to a Village Builder Category?
How to create a new Village Builder Service Group?
How do volunteers see Open Service Requests?
Service Request Status Definitions
Service Requests - Misc
How to register Preferred Addresses?

How can I see all my service requests?

Premium Features

Premium Features Pricing List

Zoom

How to set up the Zoom Module with Server-to-Server Oauth
Why should you use the Zoom Module?
How to use the Zoom Module?

Check- ins

What is the Wellness Check-ins Premium Feature?
What are HV Emergency Groups?
How to create an Emergency Campaign?
What is the Check-in Dashboard?
How can Admins monitor the Check-Ins?
How to view check-ins in the past
What is the Phone Tree for Volunteer Check-ins?
How Admins can edit guidelines for Check-ins calls
How a User may register their own Check-Ins?

Geocoding

What is the Geocoding Premium Feature?

Village Maps

What is the Village Maps feature?
What is the price for Village Maps Premium Feature?

Text Messages

What is the Text Messaging Premium Feature?
How to Send a Text Message

Instant Membership

- How to Add Instant Membership to Application Forms
- How to Submit Application Using Instant Membership

Additional Resources

- What is the Quickstart Guide?
- What is the Helpful Village Manual?