

Tool Profile Webinar

March 2015

VSys One comes with a lot of functionality and tools to help manage your volunteer department. By default, the main screen includes all of these tools – which can be a bit cumbersome. Tool Profiles allow you to customize the main screen to include only the tools you're using on a regular basis. Each person using VSys One can have it set up differently, depending on the role they play in your department. This webinar will show you how to setup tool profiles to fit your needs.

Enabling Tool Profiles

Creating a Tool Profile

- *Built-in Sample tool profiles:* these are built-in examples of what a tool profile can include/look like.
- *Add tool profile:* create and customize the main screen of VSys by dragging and dropping the tools.
 - *Settings*
 - *Tools – drag/drop available fields*
 - *Panels:* you can define your own panels
 - *Groupings:* allow you to group tools together
 - *Saved reports:* allow you to add customized reports to the main screen
 - *Edit panel, group or tool settings* (right-click option)

Using a Tool Profile

- How to switch to different tool profiles

Example:

