Day 1
Importing & Managing Your Database

* 90-minute tutorial & Q+A
Who is this for?

- All Trial users
- New Admins on existing accounts
- Current Users looking to learn more
- Curious others :)

[Image of a graduation cap over a computer screen with plants growing]
Boot Camp Agenda

● Day 1 - Monday
  ○ Importing & Managing your Database

● Day 2 - Tuesday
  ○ Online Payments & Events

● Day 3 - Wednesday
  ○ Emails, Directory, & Social Features

● Day 4 - Thursday
  ○ Customizing your Wild Apricot Website

● Day 5 - Friday
  ○ Additional Features, Tips + Tricks, and Q&A
Your instructors today...

Wild Apricot Coaches
coaches@wildapricot.com

...or find us live on chat!
Useful Links

When you see links in **Light Blue**...

- [Online Payments Overview](#)
- [Security Policy](#)

...you can click them to go directly to the help page for more information!
Today’s Lesson

Part 1: Database Management

1. What is a member?
   ○ Contacts vs Members
   ○ What can you do with members?
2. Member Management Options
   ○ Membership Application Form
   ○ Field types
   ○ Privacy
3. Types of Membership
   ○ Individual
   ○ Bundle (Family, Corporate, Groups)
4. Q & A
Today’s Lesson

Part 2: Importing

1. Import Options
   ○ How to prepare
2. Example Import
   ○ Mapping your data
   ○ Ensuring accuracy
3. What you can/cannot import to Wild Apricot
4. Q & A
Finding Your Way Around Wild Apricot

Before we get started let's make sure we can **navigate** Wild Apricot.
Finding Your Way Around Wild Apricot

Logging In

- Go to your Wild Apricot Webpage
- Log in with the email / password you used to sign up
Finding Your Way Around Wild Apricot

Or log in at WildApricot.com
Finding Your Way Around Wild Apricot

This is your Wild Apricot Admin View. This is where the magic happens.

Main Menu

Sub-Menu

Public/Admin View Modes

Your Account
Finding Your Way Around Wild Apricot

This is your Wild Apricot Admin View. This is where the magic happens.
Finding Your Way Around Wild Apricot

This is your Wild Apricot Admin View. This is where the magic happens.

- Introductory video “Getting started”
- Not as extensive as this boot camp
- Good refresher material for later!
Managing your Database
Things we will cover:

- Contacts + Members
- Creating new fields
- Adding and deleting records
- Adding groups
- Adding administrators
- Making a member application form
- Types of membership
What is a member?

1. Everyone in your database is a contact.
2. All members are contacts.
   ○ Not all contacts are members.
3. Members have special privileges:
   ○ Can access members-only pages
   ○ Can appear in member directory
   ○ Can take advantage of store discounts
   ○ Can be organized into member groups
4. Members will also pay dues based on what you have set in their corresponding Membership Level.
What is a member? Usefull Links

Help Site Articles:

What is a member? What is a contact?

Everything you need to know about Members

Membership Setup Checklist
Membership Types you Can Create:

<table>
<thead>
<tr>
<th>Individual Membership</th>
<th>Family Membership (Bundle)</th>
<th>Corporate/Group Membership (Bundle)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eg: $100/yr</td>
<td>Eg: $100/yr</td>
<td>Eg: $100/yr</td>
</tr>
<tr>
<td>1 member</td>
<td>1 bundle administrator</td>
<td>1 bundle administrator</td>
</tr>
<tr>
<td></td>
<td>5 bundled members</td>
<td>Unlimited bundled staff</td>
</tr>
</tbody>
</table>

Also edit:

- Specific renewal dates
- Upgrade/downgrade behavior
- Whether members can switch levels
- Email templates for member-related emails
  ... and other things!
Member Levels:

1. Are the memberships/subscriptions you offer.

2. Can have a custom:
   - Name
   - Cost
   - Renewal Date
   - Email template
     - Welcome Email
     - Renewal Email
     - Activation Email

3. Multiple custom member levels will comprise your different membership options.
Member Levels Useful Links

Help Site Articles:

All About Member Levels
How to Add Members Manually
Membership Setup Checklist
Bundle Memberships
## Common Fields / Member Fields

### Common Fields
- First Name
- Last Name
- Email
- Phone #

- Used for everyone in your database.
- Will appear at start of membership application.
- Will appear on event registration forms.
- Will appear on donation forms.
- Use in personalized emails.

### Member Fields
- Preferences (eg: Favorite Color)
- Organization-specific selections
- Set-up or additional $$$ costs
- Anything you would ask applicants

- Used only for ‘memberships’
- Will appear on membership application.
- Will appear in member directory.
- Use in personalized emails.
Common Fields / Member Fields

Useful Links

Help Site Articles:

- Common vs Specialized Fields (Member Fields)
- Setting up the Membership Application Form
- Membership Setup Checklist
Field Types

Different style options for questions on your form.
## Field Types

Different style options for questions on your form.

<table>
<thead>
<tr>
<th>Field Type</th>
<th>Description / What It Does</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text</td>
<td>Normal line of text</td>
</tr>
<tr>
<td>Multiline text</td>
<td>Longer text up to 3000 characters</td>
</tr>
<tr>
<td>Multiple choice</td>
<td>Multiple selections can be picked</td>
</tr>
<tr>
<td>Radio buttons</td>
<td>Only 1 selection can be picked from all options</td>
</tr>
<tr>
<td>Multiple choice with extra charge</td>
<td>Adds additional costs to invoice (eg: Each selection is $5 extra)</td>
</tr>
<tr>
<td>Radio buttons with extra charge</td>
<td>Adds 1 additional cost to invoice (eg: Can select 1 from 5 options)</td>
</tr>
<tr>
<td>Extra charge calculation</td>
<td>Extra Membership costs (eg: $100 x # of family members)</td>
</tr>
<tr>
<td>Dropdown</td>
<td>Select 1 option from a drop-down list</td>
</tr>
<tr>
<td>Picture</td>
<td>Upload a profile picture</td>
</tr>
<tr>
<td>Rules and terms</td>
<td>A checkbox with your organization’s rules included</td>
</tr>
<tr>
<td>Date</td>
<td>Select a date from a calendar</td>
</tr>
<tr>
<td>Section divider</td>
<td>Organize your application form into sections using dividers</td>
</tr>
</tbody>
</table>
Field Types Useful Links

Help Site Articles:

- All About Member Levels
- How to Add Members Manually
- Membership Setup Checklist
Member Privacy

- Privacy has 2 levels of security
- Admins set global access
- Members also have control over their own information

My profile

<table>
<thead>
<tr>
<th>Details to show</th>
<th>Anybody</th>
<th>Members</th>
<th>No access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Photo album</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Send message form</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Membership level</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>User ID</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>First name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organization</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Member Privacy Useful Links

Help Site Articles:

Wild Apricot’s Privacy Policy

Member Privacy Settings
Groups

- Used for special-interest groups
  - Board Members
  - Volunteers
  - Staff

- Must already be members
  - Can be from any membership level!

- Select groups to receive email blasts (including event announcements)
- Control page + file access by member group
- Restrict events by member group
- Limit permissions in blogs and discussion forums by member group
Groups Useful Links

Help Site Articles:

All About Member Groups

Tutorial Video: Groups
Importing
Things we will cover:

- Preparing your spreadsheet
- Importing
- Assigning the right field types
- Making sure members stay members
- How to start over if needed
Things to Remember:

1. *You can start over if needed!*
   - Don’t be afraid to import your contacts.
   - There is a delete button :)

2. *Records can be edited in bulk.*
   - You can make changes to multiple records.

3. *The system will try to help you ensure everything goes to the right place.*
   - You always have the final say!

4. *You will be able to review your import, including any errors.*
How to Prepare:

● Merge your existing data into a spreadsheet.
  ○ If your organization is currently using another software, you will need to Export your existing data.
  ○ Wild Apricot can only import data from one spreadsheet at a time.

● Standardize Date Formats
  ○ All dates should be in the same format
    ■ Example: 31 Dec 2014
Easy Way to Import

- An Easy method for preparing your spreadsheet is to do the following:
  - “Export” your data from Wild Apricot.
  - This will create a spreadsheet template with your existing data fields.
  - You can then use it to accurately prepare for the mass import.
An easy method for preparing your spreadsheet is to do the following:

- Export your data from Wild Apricot.
- This will create a spreadsheet template with your existing data fields.
- You can then use it to accurately prepare for the mass import.
Easy Way to Import Useful Links

Help Site Articles:

- Exporting Members + Contacts (to do the easy import method)
- All about Importing
- Import Checklist <- Use this, it’s really good!
Import Checklist

To ensure an accurate import, follow these steps:

1. Use only 1 ‘sheet’ on your spreadsheet
Import Checklist

To ensure an accurate import, follow these steps:

1. Use only 1 ‘sheet’ on your spreadsheet
2. Remove any extra rows
Import Checklist

To ensure an accurate import, follow these steps:

1. Use only 1 ‘sheet’ on your spreadsheet
2. Remove any extra rows
3. Check your column headers
Import Checklist

To ensure an accurate import, follow these steps:

✔️ 1. Use only 1 ‘sheet’ on your spreadsheet
✔️ 2. Remove any extra rows
✔️ 3. Check your column headers
    4. Check cell values
You’ll want your spreadsheet to look something like this:

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Salutation</th>
<th>e-Mail</th>
<th>Membership Enabled</th>
<th>Membership Level</th>
<th>Member Since</th>
<th>Renewal Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Michael</td>
<td>Jones</td>
<td>Master</td>
<td><a href="mailto:michaelj@mailinator.com">michaelj@mailinator.com</a></td>
<td>Yes</td>
<td>Gold</td>
<td>04-05-2015</td>
<td>08-08-2018</td>
<td>Active</td>
</tr>
<tr>
<td>Evelyn</td>
<td>Smith</td>
<td>Mrs</td>
<td><a href="mailto:evelyn31@mailinator.com">evelyn31@mailinator.com</a></td>
<td>Yes</td>
<td>Silver</td>
<td>01-23-2013</td>
<td>02-22-2019</td>
<td>Lapsed</td>
</tr>
<tr>
<td>Randal</td>
<td>Bedforth</td>
<td>Mr</td>
<td><a href="mailto:randy@emperorlots.com">randy@emperorlots.com</a></td>
<td>Yes</td>
<td>Bronze</td>
<td>03-04-2018</td>
<td>03-04-2019</td>
<td>Active</td>
</tr>
<tr>
<td>Warren</td>
<td>Andre</td>
<td>Mr</td>
<td>warren@thisisnotmyemail</td>
<td>Yes</td>
<td>Silver</td>
<td>12-12-2014</td>
<td>05-22-2019</td>
<td>Active</td>
</tr>
<tr>
<td>Jeremy</td>
<td>Kong</td>
<td>Master</td>
<td><a href="mailto:kongj@mailinator2.com">kongj@mailinator2.com</a></td>
<td>Yes</td>
<td>Silver</td>
<td>11-09-2013</td>
<td>11-08-2019</td>
<td>Active</td>
</tr>
</tbody>
</table>

- Your organization will likely have its own unique fields + columns. This is OK!
- Not every spreadsheet will look the same.
  - Don’t worry about how this example looks, focus on collecting and sorting your own information.
- Biggest Concerns are usually removing extra spaces.
  - “Find and Replace” is incredible for this.
Import Checklist

To ensure an accurate import, follow these steps:

1. Use only 1 ‘sheet’ on your spreadsheet
2. Remove any extra rows
3. Check your column headers
4. Check cell values
5. Step through the Import Wizard
To ensure an accurate import, follow these steps:

1. Use only 1 ‘sheet’ on your spreadsheet
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3. Check your column headers
4. Check cell values
5. Step through the Import Wizard
Mapping 101

- **Name of the field as it appears on your spreadsheet**
  - **User ID**
  - **First name**
  - **Last name**
  - **Email**
  - **Membership Level**

- **Your data** (Grey text)
  - **Alexis**
  - **Augusto**
  - **Carly**
  - **Sandro**
  - **File**

- **Whether data should be imported or ignored**
  - Import
  - Ignore

- **Where Wild Apricot will import your data to**
  - User ID
  - First name
  - Last name
  - Email
  - Membership level

(Create ‘new’ levels if necessary)
**Import Checklist**

- To ensure an accurate import, follow these steps:
  
  1. Use only 1 ‘sheet’ on your spreadsheet
  2. Remove any extra rows
  3. Check your column headers
  4. Check cell values
  5. Step through the Import Wizard
Import Checklist

- To ensure an accurate import, follow these steps:

1. Use only 1 ‘sheet’ on your spreadsheet
2. Remove any extra rows
3. Check your column headers
4. Check cell values
5. Step through the Import Wizard

Any errors can be reviewed. Remember you can start over!
Help Site Articles:

- Mapping your data
- All about Importing
- Import Checklist <- Use this, it’s really good!
Fields the System Uses

**System Fields** do not need to be *created*, just *mapped* from your available data. The following field options are available:

<table>
<thead>
<tr>
<th>User ID</th>
<th>Member Bundle ID or Email</th>
<th>Event Announcements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td>Member since</td>
<td>Member emails and newsletters</td>
</tr>
<tr>
<td>Group Participation</td>
<td>Renewal due</td>
<td>Archived</td>
</tr>
<tr>
<td>Password</td>
<td>Status</td>
<td>Access to Profile by others</td>
</tr>
<tr>
<td>Membership Enabled</td>
<td>Subscribed to Emails</td>
<td>Details to show</td>
</tr>
<tr>
<td>Membership Level</td>
<td>Notes</td>
<td>Photo albums enabled</td>
</tr>
</tbody>
</table>

**Detailed descriptions of everything here:**  [All About System Fields]
**What you can Import:**
- First Name, Last Name, Middle Name, Salutation, Email, etc
  - Eg: Dr. John Smith, drjohn@email.com
- Membership Join / Renewal / Expiry dates
  - Eg: Joined: March 5 1995
- Member Types
  - Eg: Bronze Member, VIP member, Family Member, etc
- Member Status
  - Eg: Active, Lapsed, Renewal Due
- Privacy Preferences
  - Eg: Unsubscribed from Emails
- Groups
  - Eg: Board of Directors, Volunteers, Staff

**What you cannot Import:**
- Historic Payments, Emails, or Invoices
  - Eg: An event payment or email from 2017
- Photos or Avatars
  - Must be done manually or by the member
- Old Credit Card Information
  - Cannot be used for new billing
  - Must be re-authorized by member

**Custom or Organization-Specific Data:**
- Any Unique Fields used by your Organization
  - Eg: What is your favorite color?
- Internal Notes
  - Eg: Admin-only information.
For Trial Users

Wild Apricot Coaches
coaches@wildapricot.com

...or find us live on chat!
Use The Help Site!

Wild Apricot Help

https://gethelp.wildapricot.com/en
Thousands of guides, pictures, and videos!
On-demand help, any time, anywhere.
Ready to Move Forward?

To Upgrade:  Dashboard > Account

10% Discount for 1-year, 15% for 2-year
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Thank you for your time!

From everyone at

[Logo: Wild Apricot]