Day 2
Online Payments and Event Management

* 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 :)
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: Event Management

1. Overview
2. Schedules
   ○ Single-session
   ○ Multi-day
   ○ Repeating Events
3. Event Settings
   ○ Ticket options
   ○ Waitlists + Discounts
   ○ Guest Admission
4. Event Management
   ○ Registration
   ○ Check-ins
   ○ Mobile App
5. Q & A
Today’s Lesson

Part 2: Online Payments

1. Overview
   - What is a Payment Processor?
   - 15+ integrations
   - Wild Apricot Payments
   - Online Payment Options

2. Finance Settings
   - Country and Currency
   - Tax Settings

3. Payments
   - Issuing Invoices + Receiving Payments

4. Q & A
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.
Finding Your Way Around Wild Apricot

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

- Making Events
- Types of Events
- How to make your registration form
- Guest registrations
- Waitlists
- Checking people in
Events on Wild Apricot

- Are gatherings to which you sell admission, or are special dates scheduled in advance
- Can have different ticket types
  - Free, Paid, Discounted, etc
- Can be registered to by guests
  - A great way to get their information for emails
- Will integrate with Wild Apricott gadgets for use in calendars / forms
Built-in Event Gadgets / Widgets

No coding necessary! Automatically populate gadgets + widgets for use on your site.

View Upcoming Events with descriptions...  ...or in calendar mode!

![Events](image-url)
Events on Wild Apricot Useful Links

Help Site Articles:

- Events on Wild Apricot Overview
- Event Calendars
- Event Settings + Details
# Types of Event Registrations:

<table>
<thead>
<tr>
<th>Single Session Event</th>
<th>Multi-Session Event</th>
<th>Repeating Sessions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eg:</td>
<td>Eg:</td>
<td>Eg:</td>
</tr>
<tr>
<td>● Annual Conference</td>
<td>● Training Week</td>
<td>● Weekly Meeting</td>
</tr>
<tr>
<td>● 1 day</td>
<td>● 5 days</td>
<td>● 1/week</td>
</tr>
<tr>
<td></td>
<td>● Monday - Friday</td>
<td>● Every Tuesday Evening</td>
</tr>
</tbody>
</table>

Events can be made public, members-only, or admin-only.

Your events can have a [registration form](#) but it is not required.
Event Settings you can edit:

- Description + Date
  - Who, what, where, when, why
- Cost + Discounts
  - Ticket types, discounts
- Privacy + Access
  - Available to public, or members-only, special groups-only
- Tags + Calendar Display
  - Display all, or some of your events.
  - Separate them by tags for easy sorting.
- Total # of registrations
- Waitlist settings
- Guest Registration
Event Settings Useful Links

Help Site Articles:

Event Settings + Details
Multi-Session Events
Event Visibility
Registration Types + Tickets
Guest Registration

Easy Guest Registration. Charge extra money for guests, change the limit allowed, or collect guest info!

- First name: Steve
- Last name: Andrews
- e-Mail: steve@wildepricot.com
- Preferred seating: Front section $10.00 (USD)
- Meal choice: Seafood
- Additional guests: 1 Each $30.00 (USD)
Guest Registration

Easy Guest Registration. Charge extra money for guests, change the limit allowed, or collect guest info!

Enter guest registration information

* Mandatory fields

- First name: Jackie
- Last name: Dixon
- Organization: 
- e-Mail: jdixon@test.com

Guest list

No guest registration entered

[Buttons: Cancel, Back, Done]
Editing an Event

- Allow Guest Registrations
- Limit Visibility
- Discount Codes or Passwords
Editing an Event

Useful Links

Help Site Articles:

- Discount Codes
- Guest Registration
- Adding Registrants Manually
- Event Waitlist Settings
Manage your Registrants

Check-in attendees, view/modify their registration, and record payments all from one dashboard.

This allows you to take registrations at the door! (Especially with the Admin App)

Check-in Attendees

Record Outstanding Payments
Wild Apricot for Admins Mobile App

Let your administrator **check-in / register / accept payments** on-site.

Available on iOS and Android
Admin Mobile App Useful Links

Help Site Articles:

- Admin App Download
- Wild Apricot Admin App Help
  - iOS
  - Android

Available on iOS and Android
Event Emails

- 3 Announcement Options
- 3 Reminder Options
- Confirmed, pending, and waitlisted emails

Help Site Articles:

All About Event Emails
Online Payments
Online Payments

- Accept Credit Card Payments from members
  - MasterCard, Visa, Discover, Amex
- Do automatic invoicing + reconciliation
- Let members pay for Membership, Events, Donations, Store Items, etc.
- Take *Recurring Payments* from Members
- Available on *paid* Wild Apricot accounts
  - Included in *Trial* so you can test!
Online Payments Useful Links

Help Site Articles:

Online Payments Overview

Security Policy

How to take Manual Payments (You can still accept cash/checks!)

Setting up Recurring Payments
Online Payments Require a Payment Processor
What is a Payment Processor?

- An online payment processing gateway is a merchant service provided by an e-commerce application service provider that authorizes credit card or direct payments processing.
- A payment gateway facilitates a payment transaction by the transfer of information between a payment portal (such as a website or mobile phone) and the front end processor or acquiring bank.
- In short, it allows you to take payments online that are directly routed to your bank account.
Payment Processor Useful Links

Help Site Articles:

- Online Payments Overview
- Supported Payment Systems
- Comparing Payment Processors
No Surprises -- Payment Processing Facts

- Online Payment Processing has a fee attached to it.
  - Wild Apricot does not add this fee.
- Most processors charge a % of each transaction, a flat fee, or both.
  - Eg: 2.9% + .30c per transaction.
- This is charged to your organization, not your members.
  - You cannot reverse this.
- Funds are usually deposited to your bank account once a day. Each processor is different.
- Wild Apricot imposes no additional costs to this process.
Wild Apricot Payments

Powered by AffiniPay
- Online payment processor
- Instant application, 1-2 business days to set up
- No monthly fee
- Only 2.9% + $0.30 for each transaction
- Visa, MasterCard, American Express cards accepted

Start accepting online payments

US and Canada only. For other countries, connect to another payment gateway.

1. Submit application form
   US applicants: Please have your Federal tax ID and banking account information ready.
   Canadian applicants: no special Information is required now, but we will contact you by phone/email to get more details.
Wild Apricot Payments

Help Site Articles:

Wild Apricot Payments

To Set up Affinipay:
- Log In
- Go to Settings > Finance > Payment Settings

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Wild Apricot Payments

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- Online payment processor
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Start accepting online payments

US and Canada only. For other countries, connect to another payment gateway.

1. Submit application form

   US applicants: Please have your Federal tax ID and banking account information ready.

   Canadian applicants: no special information is required now, but we will contact you by phone/email to get more details.

   Fill in application form
15+ Integrations

- Wild Apricot is PCI DSS Compliant.
- Except for AffiniPay, you must apply to a processor independently.
- Some have recurring payments available as an option, some do not.
- Some offer charity rates.
- Shop around for what is right for your organization -- or try Wild Apricot Payments!
Payment Processor Useful Links

Help Site Articles:

- Online Payments Overview
- Supported Payment Systems
- Comparing Payment Processors
Easy Financial Reporting:

- Generate payment reports with a few clicks
- See breakdowns of payment sources:
  - Memberships
  - Events
  - Donations
  - Etc
- Quickly see outstanding payments
- Select by date range
- Export to Quickbooks
- Keep your treasurer happy!
Easy Financial Reporting Useful Links

Help Site Articles:

- Finances Overview
- Issuing Manual Invoices
- Customizing Invoice Templates
- Finance Reporting
- Exporting to Quickbooks
Regional Settings

- Set Tax Rate(s)
- Automatically add tax to Registrations
  - Membership + Events
- Select your country of business
- Set the tenders you accept
  - Cash, Check, Electronic Check, etc
Regional Settings Useful Links

Help Site Articles:

- Changing your Country + Currency
- Setting Tax Rates
- Setting new Payment Tenders
Wild Apricot Coaches
coaches@wildapricot.com

...or find us live on chat!

For Trial Users
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
For Current Users

Wild Apricot
Technical Support
support@wildapricot.com

1-877-493-6090
M-F 9:30AM - 5:30PM ET
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Thank you for your time!

From everyone at Wild Apricot