Apri
cot Boot Camp

Day 3

Emails, Member Directory & Social Features

* 90-minute tutorial & Q&A

Who is this for?

- All Trial users
- New Users on new accounts
- New Admins on existing accounts
- Current Users looking to learn more!
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: Emailing

1. Overview
   ○ Wild Apricot does emailing, too!?
2. Automatic Emails
   ○ Membership Emails
   ○ Renewal Reminders
   ○ Event Emails
   ○ Donation / Store Receipts
3. Manual Emails
   ○ Email Blasts / Newsletters
   ○ Templates + Macros
4. Q & A
Today’s Lesson

Part 2: Social Features

1. Member Directory
   - How it works
   - Customizing Results
   - Using Filtering
2. Donations
   - Setting a goal
3. Blogs + Forums
   - Who can see / post on them
4. Member Avatars
5. Member Photo Albums
6. Member App
7. 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.

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!
Emails
Ways To Stay Social

Wild Apricot has a number of ways to stay in touch with your contacts / members

1. Emails
2. Private Messages
3. Blogs
4. Forums
5. Member App
6. Website Updates + Content
Emails in Wild Apricot

- Send emails to your members anytime
  - Single members, groups of people, or your entire contact list
- Schedule Emails for Later
- Customize Automatic Emails
  - Sent as receipts, reminders, invitations, etc.
- Create, Save, and Reuse Templates
  - No HTML required!
Emails in Wild Apricot Useful Links

Help Site Articles:

- All About Manual Emails
- What you need to know about Emails
- Complying with Anti-Spam Regulations
Automatic Emails

- Memberships
  - Activation, Renewal, Expired
- Events
  - Registration, Reminders
- Donations
  - Receipt, Payments
- Forum + Blog Updates
  - Subscribe to a thread
- Invoices
Help Site Articles:

- All About Automatic Emails
- Automatically copying emails to a second address
- Automatically CC’ing admins or staff to emails
# Membership-Related Emails

## Customize default membership emails

These are default email templates - used for newly created membership levels. Emails can also be customized in each level separately. You can edit default templates and apply your changes to all existing levels.

<table>
<thead>
<tr>
<th>Membership applications</th>
<th>Renewal reminders</th>
<th>Renewal notifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application initiation</td>
<td>Reminder 1</td>
<td>Renewal pending</td>
</tr>
<tr>
<td>Application initiation</td>
<td>Sent before renewal date according to level settings</td>
<td>Sent after renewal was initiated and payment in required</td>
</tr>
<tr>
<td>Member activation</td>
<td>Reminder 2</td>
<td>Renewal confirmed</td>
</tr>
<tr>
<td>Member activation</td>
<td>Sent before renewal date according to level settings</td>
<td>Sent after renewal was paid or confirmed manually by administrator</td>
</tr>
<tr>
<td>Bundle administrator activation</td>
<td>Renewal day notice</td>
<td>Recurring renewal failed</td>
</tr>
<tr>
<td>Bundle administrator activation</td>
<td>Sent on renewal date</td>
<td>Sent when online recurring payment for renewal is failed</td>
</tr>
<tr>
<td>Bundle member activation</td>
<td>Grace period email notice</td>
<td></td>
</tr>
<tr>
<td>Bundle member activation</td>
<td>Lapsed email notice</td>
<td></td>
</tr>
<tr>
<td>Bundle member activation</td>
<td>Lapsed email notice</td>
<td></td>
</tr>
<tr>
<td>Bundle member activation</td>
<td>Lapsed email notice</td>
<td></td>
</tr>
</tbody>
</table>

Note: two emails are currently not customizable: "Member level change initiated" and "Member level change succeeded"

- All can be sent automatically - no administrator intervention needed!
Membership-Related Emails

Renewal reminders and actions

14 day(s) before renewal date
- Generate and email invoice
- and change status to Pending - Renewal

renewal reminder email 1 to
- Member
- Organization contact

0 day(s) before renewal date

renewal reminder email 2 to
- Member
- Organization contact

On renewal date

renewal day email notice
- Member
- Organization contact

If not renewed within 7 day(s)
- Change renewal period to never
- Change membership level to

Gold

grace period email notice to
- Member
- Organization contact

If not renewed within 14 day(s)
- Void renewal invoice
- Change status to lapsed
- Change renewal period to never
- Change membership level to

Gold

lapsed email notice to
- Member
- Organization contact
Membership-Related Emails Useful Links

Help Site Articles:
- Member Email Settings
- Providing an “Opt-in” mechanism
- Unsubscribing from Emails
Event Emails

- 3 Announcement Options
- 3 Reminder Options
- Confirmed, pending, and waitlisted emails
### Event Emails Useful Links

**Annual General Meeting**

<table>
<thead>
<tr>
<th>Event details</th>
<th>Registration form</th>
<th>Registration types &amp; settings</th>
<th>Emails</th>
<th>Registrants (17 incl. 5 guests)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Announcement 1 - 29 Jan 2017</td>
<td>Send now</td>
<td>Schedule</td>
<td>Reminder 1 - already sent</td>
<td>Event registration confirmed</td>
</tr>
<tr>
<td>60 day(s) before the event to:</td>
<td>- All contacts</td>
<td>- Send to registrant</td>
<td>- Send copy to organizer</td>
<td></td>
</tr>
<tr>
<td>Announcement 2 - not set</td>
<td>Send now</td>
<td>Schedule</td>
<td>Reminder 2 - not set</td>
<td>Event registration pending</td>
</tr>
<tr>
<td></td>
<td>- Send to registrant</td>
<td>- Send to registrant’s guest(s)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Announcement 2 - not set</td>
<td>Send now</td>
<td>Schedule</td>
<td>Reminder 3 - not set</td>
<td>New waitlist registration</td>
</tr>
<tr>
<td></td>
<td>- Send to registrant</td>
<td>- Send to registrant’s guest(s)</td>
<td>- Sent when new waitlist registration is confirmed</td>
<td></td>
</tr>
</tbody>
</table>

### Help Site Articles:

- All about Event Emails
- Tracking your Emails
Other Automatic Emails

- Store Emails
  - Order Placed
  - Cancelled
  - Shipped

- Donation Emails
  - Receipt
Other Automatic Emails Useful Links

Help Site Articles:
- Customizing Store Emails
- Customizing Donation Receipts
- Customizing Invoices and Receipts
Editing Emails

- Familiar Content Toolbar
- Buttons for images, links, tables, etc
- Insert ‘macros’

Customize application initiation

Email template

From: International Association of Typographers <steve@wildapricot.com>
Subject: [Membership initiated at {Organization_Name}]

Dear {Contact_FullName},

Thank you for submitting your application as a member of {Organization_Name}.

To finalize your application, log in to your profile at (Member_Profile_URL) with your email (Contact_Email) and password.

Don’t know your password? Reset it here (Contact_Password_Reset_URL)
Editing Emails Useful Links

Help Site Articles:

- Using the Content Editor
- Email Templates
- Best Practices for Composing Emails
Templates

Create + Save Templates

...or use one of the 20+ built-in options
Macros let you personalize emails
Use people’s real details
  Eg: Their Name
Let you create 1 email that will make sense for everyone
Insert Macros with 1 click from toolbar
Macros

Help Site Articles:

[All About Macros](#)

[Using Custom Macros](#)
Schedule Emails for Later

- Plan e-mail campaigns in advance
- Create entire communication plans!

Delivery setup

When to send

- Send it now
- Schedule for later

Choose delivery date and time

Date: Select date

Time: AM PM
Email Log Useful Links

Help Site Articles:

Using the Email Log
Social Features
Things we will cover:

- Blogs
- Forums
- Donations / Fundraising
- Member Directory
- Avatars + Photo Galleries
- Member Profile Pages
- Direct Messages
Blogs / Forums

**Blogs:**
- **Built-in Gadget**
- Let you post regular updates on your site
- Can be commented on
- Posts can be made by members with the right permissions

**Forums:**
- **Built-in Gadget**
- A message board for the entire site
- Shows user’s pictures
- Posts can be made by members with the right permissions
The IAT typography blog

Is retro the new modern?
21 Aug 2013 03:15 | Anonymous

Vintage, retro, and timeless typefaces.

Read more • Add comment

Edit • Delete

Monotype releases font suite for mobile developers
21 Aug 2013 03:11 | Anonymous

Erik Winther demonstrates how to create a quick and easy gold effect using LHF Verdi.

Read more • Add comment

Edit • Delete

Book review: Just My Type by Simon Garfield

Read more • Add comment

Edit • Delete
# Forum Example

## Typeface forum

<table>
<thead>
<tr>
<th>Topic</th>
<th>Last message</th>
<th>Replies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rules of the forum</td>
<td>21 Aug 2013 03:18</td>
<td>—</td>
</tr>
<tr>
<td>What is your least favorite font?</td>
<td>21 Aug 2013 03:19</td>
<td>—</td>
</tr>
<tr>
<td>Which works best online -- serif or sans serif?</td>
<td>21 Aug 2013 03:19</td>
<td>—</td>
</tr>
</tbody>
</table>

Create topic

[Subscribe to forum](#)
Help Site Articles:

- [Using Blog Gadgets](#)
- [Discussion Forum Gadget](#)
- [Forum Summary](#)
- [Forum Updates](#)
Donations

1. **You can take donations through Wild Apricot.**
   - Online and automatically.
   - Manually, then recorded.

2. **Put a form directly on your site with the Donation Form Gadget.**
   - Have multiple goals, 1 per form.

3. **Customize a ‘receipt’ email to send contributors.**
   - Include all relevant tax info for your donators’ accounting.

4. **Online Donations require you to have set up online payments.**
Message from Georgia:
Hello everyone! I am raising funds for childhood cancer research and I need your help! Please click the Donate button below. Any amount you can donate would be greatly appreciated.

Georgina’s fundraising efforts

Collected: $0.00
Goal: $500.00

0%

Donation Form

Amount ($USD): $50.00

Fund:
- Maintenance fund
- Expansion fund

Comment: Keep up the good work!
Donations Useful Links

Help Site Articles:

All About Donations
Donation Forum Gadget
Donation ‘Goal’ Gadget
Setting up Online Payments
Member Photo Albums

- Member photo albums are collections of photos that can appear on a member’s profile.

- Members can create multiple photo albums and upload photos to their albums.
  - Descriptions
  - Captions
  - Privacy

- Admins control if this is turned on/off
  - Also control how many photos
Member Photo Albums

Holiday photos (1/4)

Where I spend most of my summer vacation

Save  Cancel
Member Photo Albums

Useful Links

Help Site Articles:

- Member Photo Albums
- Member Album Settings
- Enabling Photo Albums
Member Avatars

- You can add a field for photos / avatars
- This will let your visitors upload a photo for use in their profile
- The photo can appear in:
  - Profile Pages
  - Directories
  - Forum Posts
  - Membership Cards
  - “Featured Member” Profiles
Member Avatars

Help Site Articles:

- Adding Profile Pictures
- Privacy Settings for Photos
- Adding New Database Fields
Member Directories

- A member directory is a catalogue of your members
- Let visitors view, search for, and message members directly
- Filter the directory to include as much information as you like
  - Customize the results layout
- Members can select their own privacy settings / whether they want to appear
# Member Directories

Active members of the International Association of Typographers

<table>
<thead>
<tr>
<th>Name</th>
<th>Location</th>
<th>Picture</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alvin Headley</td>
<td>San Francisco</td>
<td><img src="image" alt="Alvin Headley" /></td>
<td>Gold</td>
</tr>
<tr>
<td>Headley Design Partners</td>
<td>California</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>United States</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Augusto Sandino</td>
<td>New York</td>
<td><img src="image" alt="Augusto Sandino" /></td>
<td>Platinium</td>
</tr>
<tr>
<td>Font designer</td>
<td>New York</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FontHaus</td>
<td>United States</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Carly Rose</td>
<td>Toronto</td>
<td><img src="image" alt="Carly Rose" /></td>
<td>Platinium</td>
</tr>
<tr>
<td>Graphic artist</td>
<td>Ontario</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Creative Solutions</td>
<td>Canada</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Member Directories

Help Site Articles:

- All About the Member Directory
- Member Directory Settings
- Member Privacy Settings
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

<table>
<thead>
<tr>
<th>Dashboard</th>
<th>Contacts</th>
<th>Website</th>
<th>Events</th>
<th>Members</th>
<th>Donations</th>
<th>Finances</th>
<th>Emails</th>
<th>Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview</td>
<td>Account</td>
<td>Organization</td>
<td>Referrals</td>
<td>Support</td>
<td>Getting started</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. **Upgrade account plan**
2. **Change billing contact**

**Account**

**General**

- Account #: 6435 (Please provide when requesting support)
- Account plan: Free (See pricing)*
  - Up to 50 contacts in your database. Ad-sponsored. No access to premium functionality (your own website address, online payments etc). You can upgrade to a premium (billable) account plan at any time.

**Contacts**

- Storage: 100 MB available
  - 0 MB (0%) currently used
  - 5 MB limit for each file upload
- Contacts: 3 (Account plan limit: 50)
  - [Delete contacts]
  - [Delete your account]

[Wild Apricot]
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Thank you for your time!

From everyone at Wild Apricot