Day 5
Additional Features, Tips + Tricks, and Q&A

* 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: Additional Features

1. Online Store
2. Member Cards
3. Surveys & Polls
4. Adding Admins
5. Bulk Updates
6. Admin App
7. Members App
Today’s Lesson

Part 2: Q&A

1. Questions
2. Answers
3. More questions...?
4. More Answers!
5. Graduation
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.

<table>
<thead>
<tr>
<th>Main Menu</th>
<th>Sub-Menu</th>
<th>Public/Admin View Modes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dashboard</td>
<td>Overview</td>
<td>Getting started</td>
</tr>
<tr>
<td>Contacts</td>
<td>Account</td>
<td></td>
</tr>
<tr>
<td>Website</td>
<td>Organization</td>
<td></td>
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<tr>
<td>Events</td>
<td>Referrals</td>
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<td>Settings</td>
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<td>Email</td>
<td>Public view</td>
<td></td>
</tr>
<tr>
<td>Settings</td>
<td>Wild Apricot</td>
<td></td>
</tr>
</tbody>
</table>

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 Apric和平

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!
Additional Features
Built-in Online Store

- Available on **Paid Plans**
  - Also included in **Trial** for testing
- Integrates with your Online Payment Processing
- List and sell items on your site
- Create separate pricing and discounts for members

Built-in Online Store
Built-in Online Store

Welcome to our store!

Maincoon T-shirt
$25.00
$20.00 - Member price

Siamese cat t-shirt
$25.00
$20.00 - Member price

Rotweiler T-shirt
$25.00
$20.00 - Member price

Chihuahua T-shirt
$25.00
$20.00 - Member price
Built-in Online Store

Include sizes, or color variants.

Set member pricing.
# Built-in Online Store

See, track, and fulfil orders all from one screen.

<table>
<thead>
<tr>
<th>Order</th>
<th>Date</th>
<th>Billing Person</th>
<th>Payment Status</th>
<th>Order Status</th>
<th>Total, USD</th>
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<td>PAID</td>
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<td>8.00</td>
</tr>
</tbody>
</table>
Built-in Online Store

Customize emails associated with your store!

Store emails

Customer emails

- **Order successfully created**
  Sent automatically after customer completes checkout

- **Order shipped / fulfilled**
  Sent automatically when order is marked fulfilled

- **Order cancelled**
  Sent automatically when order is marked cancelled

Admin notifications

- **New order**
  Sent automatically after customer completes checkout
Online Store Useful Links

Help Site Articles:

- Setting up an Online Store
- Store 'Cart' Gadget
- Store 'Catalog' Gadget
Member Cards

- Wild Apricot allows you to create automatically updating Membership Cards for your users
- They can be printed or saved as PDF for use offline
- Great for events, conferences, etc
- If enabled, appears on a member’s profile page
Member Cards Useful Apps

Help Site Articles:

- All about Membership Cards
- Printing your own Membership Cards
Surveys, Elections, and Polls

- You can set up an internal poll on Wild Apricot
- Useful for Surveys, Elections, Questionnaires, and any ‘poll’ you can think of.
- Send to specific users / keep private.
- Set options, start / end dates
Create new poll

Question 1

- Question title: Where should we hold our conference?
- Type of question: Radio Buttons (single selection)
- Options:
  - Boston
  - Las Vegas
  - Toronto

Add question
Surveys, Elections, and Polls

Create new poll

General Questions Access & settings

Question 1

Where should we hold our 2018 conference?

- Boston
- Las Vegas
- Toronto
- Other: Orlando

Add option

Add question
Surveys, Elections, and Polls

Useful Links

Help Site Articles:

Polls, Elections, and Surveys
Adding Additional Admins

- Having multiple admins can expand your capability a lot.
- On paid plans you can have unlimited Administrators.
  - Trials = 5 admins
  - Free = 1 admin
Adding Admins

- You can only add contacts that are already in your database
  - So just make sure they have a contact! :)
Admin Roles

- Admin roles let you assign site responsibilities to certain people.
- Options include:
  - Full Admin
  - Read-only Admin
  - Limited Admin
    - Membership Manager
    - Events Manager
    - Donations Manager
    - Website Editor
Admins Useful Links

Help Site Articles:

All about Account Administrators

Restricted Features by Admin Role
Making Changes in Bulk

You can update multiple records at the same time on Wild Apricot with a simple process:

1. Export everything
2. Make your changes
3. Import them
Making Changes in Bulk \textbf{Useful Links}

Help Site Articles:

\textbf{How to make Bulk Changes}
Admin App

Available on

iOS & Android

- Add / Edit Members
- Create / Manage / Check-in Events
- Compose / Schedule / Send Emails
Admin App Useful Links

Help Site Articles:
- Wild Apricot for Admins App (iOS)
- Wild Apricot for Admins App (Android)

Downloads:
- iOS
- Android
Member’s App

Available on: iOS

(Android coming soon)

- View / Update Profile
- See / Register / Pay for Events
- Use / Send messages to Directory
Member’s App Useful Links

Help Site Articles:

- Wild Apricot for Members App (iOS)

Downloads:

- iOS
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For Trial Users

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coaches@wildapricot.com

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For Current Users

Wild Apricot Technical Support

support@wildapricot.com

1-877-493-6090
M-F 9:30AM - 5:30PM ET
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
Congratulations! 🎉

Class of 2018