2017

Wild Apricot Administrator Manual

Mike Rice

Cottonwood Tennis Club.

1/1/2017

Contents

Sending Mass Emails

Overview

To send a mass email, you must have one of the following administrator roles:

- Site Administrator – Full Access
- Membership Director
- Event Manager

There is a 5-step process:

1. Templates. Select a template.
2. Design. This just means typing your email into the template,
3. Preview. See what your email will looking like and send a test to yourself.
4. Recipients. Add a subject and select the recipients it will got to.
5. Review and send.

Steps

At any point, you can return to a previous step.

To begin, select Email > Emails from the Admin menu and press the Compose Email button.
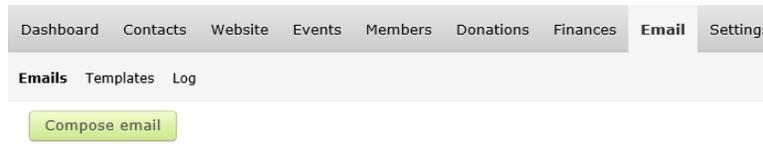
1. Select a template. Just click on the template you want to use.
   a. The templates have a consistent look and feel so recipients become familiar with it and know it comes from the club.
   b. You can change any of the text in a template. You can rewrite the email portion completely. It's just a starting point.
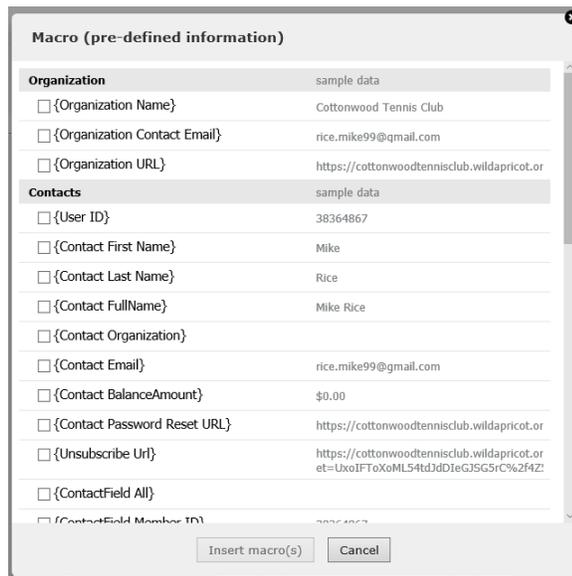
2. Design. Just click in the body of the email and start typing.
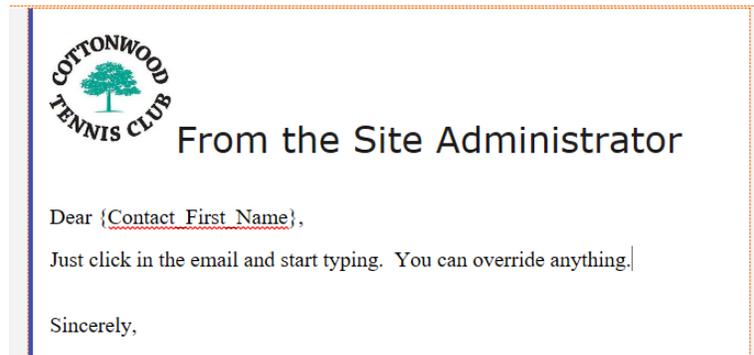
{Contact_First_Name} is a "macro" to Wild Apricot. I would call it a variable. One each email it gets replaced by the member's first name. You can remove it, and you can insert other macros from the drop down box in the menu bar.

Click on the drop down box and scroll down to see all the macros.

3. Preview. You can see what the email will look like on a desktop and mobile device, and you can send yourself a test email.
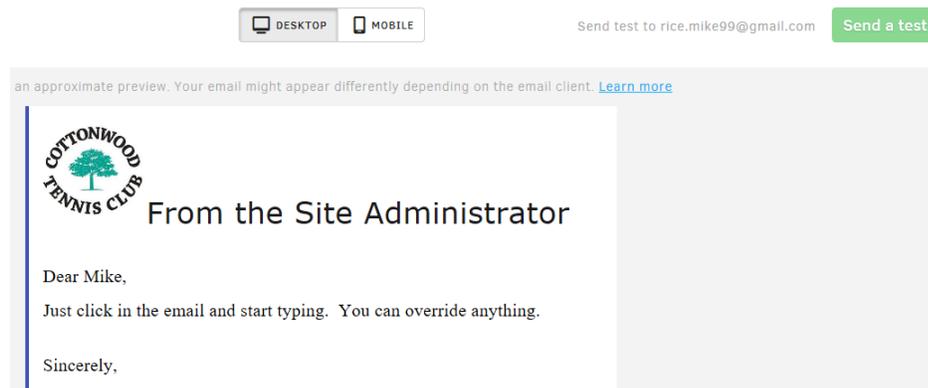
4. Recipients. Choose the email list to use, and fill in the subject. Be to use the list with real email addresses.

Choose recipients and subject

Recipients: [👥 **Members w real email addresses**]

[+ Contact]   [+ Contact list]   Clear all recipients

Subject: | Test   {} |

Type { to see available macros

Reply to: | Mike Rice | | rice.mike99@gmail.com | [Change reply to]

5. Review your email and press the Send button.

Delivery setup

When to send

◉ Send it now

◯ Schedule for later

Recipients and subject   ✎ Edit

Send to: 229 recipient(s)

Subject: Test

Reply to: Mike Rice <rice.mike99@gmail.com>

Tracking: Enabled until 26 Aug 2017

Membership Management

Membership Records

Common Fields

These fields make up a Contact. Literally, anyone who has contacted us: Applied for Membership, Registered for an Open Tournament etc. To see the common fields, select Contacts > Common Fields from the admin menu.

Customize common database fields

- Drag a field to change order
- Click a field to edit

[Add new field]

System field
Required field
For administrator access only

Access by others: anybody
members
no access

Field		
Member ID		
Org		
Email		
First name		
Last name		
Gender		
Spouse		
HOA		
Home Phone		
Cell Phone		
Address		
Admin Notes		

Member Fields

Member fields are unique to members. A complete member record consists of Common Fields + Member Fields. To see the Member Fields, select Members > Membership Fields from the admin menu.

Customize member database fields

( ) All fields   ( ) All fields in level: [Select membership level... ∨]   ( ) Common for all levels

- Drag a field to change order
- Click a field to edit

[Add new field]

System field
Required field
Used in selected levels only

Member can edit in profile
Member can edit in application
Member can view only

Access by others: anybody
members
no access

Based on your settings, the following common form fields will be added to the membership application form:
Member ID, Email, First name, Last name, Gender, Spouse, HOA, Home Phone, Cell Phone, Address

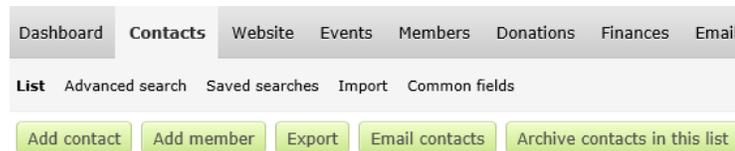| Field			
Group participation			
Rating			
Club Resume			
Fake EM			

Creating a Member Record Manually

To create a member record, you must enter the common fields first and then add the membership fields.

1. Select Contacts > List from the administrator menu.

2. Press the Add Member button.

3. Enter the member's details. Then press Save.

Notes: Leave passwords and Club Resume blank. Admin notes are optional.

4. Generate Invoice.
   a. After saving, the window will move to the membership tab.
   b. Membership status will be Pending – New
   c. Press the Generate Invoice button

Contact details	⚠ Membership	Events	Donations

Membership   [Edit] [Suspend]

⚠ **Membership application pending – no invoice generated**
Application is pending but there is no invoice. This happens due to manual editing of membership profile or manual assigning of membership. You can activate without an invoice and create an invoice later.

[Activate without invoice] [Generate invoice] [Cancel]

Membership level   2017-2018 Membership
Membership status   ⚠ Pending – New

5. Create Payment-Received-in-Full invoice
   a. Add a message to the invoice, such as a Thank You.
   b. Enter any internal notes, such as a check number.
   c. Check the Payment received in fill box. (Lower right).
   d. Press Save.

[Save] [Cancel]

Back
Add invoice
Invoiced to
Mike Rice (39036380, rice.mike99@yahoo.com) Change

Details	* Mandatory fields	Internal notes

Date | 23 May 2017

Comments for payer | Welcome to the club Mike!

Internal notes: Mike's check number was 1017.

Item	Amount, $	Tax 1	Tax 2
Membership application. Level: 2017-2018 Membership	50.00	Select tax	Select tax

Invoice total   **$50.00**

☑ Payment received in full

Select payment tender

6. Send the Paid invoice to the new member.
    a. Press the Email button.
    b. Follow the steps for sending the email.

| Preview & print | Email | Edit | Void invoice |

Back   Financial transactions
Invoice details (00014)   **FULLY PAID**

Invoiced to
Mike Rice (39036380, rice.mike99@yahoo.com)

Details		Internal notes
Balance due	$0.00 Settlement details	Mike's check number was 1017.
Amount	$50.00	
Invoice #	00014	
Origin	Member application	
Date	23 May 2017	
Comments for payer	Welcome to the club Mike!	

Item	Amount, $
Membership application. Level: 2017-2018 Membership	$50.00

Settlement details

7. Approve the Membership Application
    a. Use Members > List to find the member record.
    b. Click on the Member name.
    c. Press the Approve button.
    d. Member Status will change to Active.
    e. Member will receive an automatic email confirming their membership.

| Contact details | ⚠ Membership | Events | Donations |

Membership | Edit | Suspend |

✓ **Membership application paid – approval required**
| Approve | Reject |

Membership level	2017-2018 Membership
Membership status	⚠ **Pending – New**
Member since	23 May 2017
Renewal due on	1 Apr 2018
Renewal date last changed	23 May 2017
Level last changed	-

Done

Completing an Online Application

The online application allows the applicant to enter their own data for all the common fields. This improves the accuracy of the data, and reduces the data entry load on the membership chair.

Fill in application form

Email	jcash@country.com
First name	Johnny
Last name	Cash
Gender	M
Spouse	June Carter
HOA	

Please select an HOA code if not Cottonwood/Palo Verde.

Home Phone	480-555-1234
Cell Phone	480-555-4321
Address	100 Folsom Lane

When they submit the application, Wild Apricot creates a contact record for them.

To complete the application:

1. Find their contact record by selecting Contacts > List from the Admin menu.

Contacts

Simple search	Advanced search	Saved searches

Filter: All   Search: cash   Records found: **1**

Contact	Membership	Events
⚠ **Cash, Johnny** jcash@country.com, 39117823	Pending - New 2017-2018 Membership	

2. Click on the contact name. This will take you to the Contact tab. Since the applicant entered all the contact data we need, skip this and click on the Membership tab.

Contact details	⚠ Membership	Events	Donations

Membership   [Edit] [Suspend]

⚠ **Application pending – not paid yet**
Invoice #00017 created on 28 May 2017
Invoice amount $50.00

[Activate without payment] [Record payment]

Membership level   2017-2018 Membership
Membership status   ⚠ **Pending – New**

3. Click the Record Payment button.
4. Now follow steps 5-7 under Create a Member Record Manually.

Updating Member Detail Fields

Generally, members should maintain their contact fields by updating their My Profile. To update member detail fields:

1. Find their member record by selecting Members > List from the Admin menu.
2. Click on the member name. This will take you to the Member tab.
3. Click on the Edit Button.
4. You will be able to edit Contact and Membership fields.
   a. Contact field changes. You might change these fields if requested by a member with limited computer skills.
   b. Membership field changes. Generally, this would be just rating or fake email indicator.
5. Don't forget to press save after any changes.

Contact details	Membership	Events	Donations

Membership   [Edit] [Renew] [Suspend]

Membership level	2017-2018 Membership
Membership status	Active
Member since	28 May 2017
Renewal due on	1 Apr 2018
Renewal date last changed	28 May 2017
Level last changed	-

Membership fields

Rating

Club Resume

Fake EM

Annual Dues Collection Processing