

Event Setup & Management Guide for Wild Apricot

The purpose of this guide is to describe the various options for creating an Event posting. Included are detailed steps for creating each of the Event format as well as the features provided for Managing an Event using the Wild Apricot Event Posting Tool.

An Event can be Monthly Meetings, Major Trips, Weekend Trips or any Event or Activity. Essentially, they are all much the same. For simplicity **Event** will be used to refer to any of the different types. The major difference is under which Web Page the Event gets displayed.

Please read thru this whole description before starting to create an event most especially if this is your first time creating an event.

Preliminary items that should be completed prior to Entering an Event.

First before you can start you must be made an Event Administrator by the Web Master Similar to what was done with Meetup to enter an Event.

For reference two Sample Event formats may be found among the Admin Web Events List. They are named [A Simple Sample Format](#) and [Advanced Sample Format](#).

Pictures or Event Application

If you plan to have pictures as part of your event description you will need to supply them. Please provide pictures in reduced size and JPG format.

If your event will have a special trip application create the application and try to save it in PDF format.

Forward your Event application and any pictures to the Webmaster or Operations director so they can be uploaded to the Website.

Event Setup & Management Guide for Wild Apricot

Getting Started

First: Login in as any member would.

Notice the little round icon in the upper right that says “Admin View”. If you got this far you must be an Event Admin.

If you do not see the Admin View button contact the Web Master or Operations Director to be setup with Event Admin access.

Event admin Access.

Click the Admin View Icon to get into Admin mode, otherwise you are in Public View. I know it may seem backwards but that is the way it works. The button indicates where you want to go, not where you are.

The Admin View Button will bring you to a new page with a strip menu down the left side. The Admin function menu on the left should show Events among other options

If you end up on a website page After you click “Admin View” you will need to click the small house icon in the upper left to view the Admin function list.

Slide your mouse over Events to expose Event List and Event Emails and click on the List Option.

Setting the Date range - Notice the date range at the top when the Event List opens

You may need to change the begin and end Months at the top of the list - especially if they are greyed out. The date Range may display some other period.

Notice the little blue arrows at the top of the calendar. Click the left arrow to move back a month, click the right arrow to move forward. Also Notice the year that is displayed. Be sure to select the correct month and year.

Now Click on the down Arrow next to the Start or Left Calendar month and set it to the current month or perhaps a month earlier.

Next click the Down Arrow next to the End Calendar month and set to it to at least the month of your planned Event or maybe a month or so later.

Click Apply once you have selected the preferred date range. Only Events occurring within the selected date range will appear on the event list. Prior events will be greyed out.

Scroll thru the existing events. Double Click on an event that may look similar the event you are planning to open it. When you are done reviewing the event click cancel to exit.

Event Setup & Management Guide for Wild Apricot

EVENT Setup Options.

Two Templates are provided to setup an event from scratch.

1 – Simple Format Suggested for Meetings 1 Day Activities or Events with Tickets.

2 – Advanced Format – Suggested for Major Trips or Events with multiple options.

Refer to the Website posted Events list and check the Simple and Advanced Sample Events.

Simple Format - For a Simple format event you will See 3 Tabs:

Event Details, Emails, plus Registrants & Invitees

Advanced format - For an Advance format event you will See 6 Tabs:

Event Details, Registration form, Registration types & Settings, Emails, Registrants & Invitees plus Waitlist & Setting.

Content for tabs common to both format types are the same. A detailed description of each tab and the required information for each follows.

Copy or Duplicate Option

There is also a third option for creating an event and that is by Duplicating a similar existing event. Use this option for repeated similar Activities such as monthly meetings or kayak trips.

Caution copying an event may be easiest method to create but it has its caveats. The copied event will retain the same Tabs as the copied event and you will not be able to add or remove tabs. Plus the event description formatting and announcement emails maybe retained. This could cause problems formatting the text of your own event.

Copying an existing Event

Click the **Duplicate** button displayed to the right of the Event you wish to use as a **template for your event**. A copy will be made of the event you selected and open with same name date description and details except the **original name will be preceded by (Copy)**

Now Click the **Edit** button in the upper left and **change the Event name by Typing the name of your event in the Title box replacing the existing event**.

Click Save NOW to save your new event, so you do not overwrite the existing event.

To edit the various tabs of the copied Event see the descriptions under the respective tabs detailed below.

Event Setup & Management Guide for Wild Apricot

General Event Preparation Information

Event Announcement Emails

Note that Event Announcements Emails are generated automatically based on the description you enter for an event. See details below under Event Emails.

Event Save Process

When you click Save at any point the event will be saved in the state or form completed up to the point you Saved it. So be sure to Save your work before stepping away, to avoid a headache from losing of work.

Displaying an Event

An Event will not be displayed on the Webpage for general or member viewing until you change from Admin Only opposite the Visible To that appears above all Event Tabs.

Visible To: This will show Admin Only when you first open the Event.

Only change this when you are ready to post your event.

Click on the highlighted Admin Only and it will display:

Public, Admin Only or Restricted

When you select **Restricted** you will be allowed to Select **Members or Groups**. Select the audience you want to target. Typically you click members, for all members.

Public – If you select public your event will be open to the general public which **will allow someone to sign up for an event that is restricted to members only**

Allow Registration – Move this slide button only when you want to allow signup for your event.

Thus it is possible to have your event show on the website but still prohibit signup.

Admin List of Events

Note an Event will be identified as **Disabled** on the Event list until it has been Enabled

Event Setup & Management Guide for Wild Apricot

Tab Content Descriptions

Event Details Tab

Click the Event Details Tab if it is not highlighted.

Click the Edit button in the Upper left to begin entering your event information..

You Must click Edit to be able to Enter any information.

Title Box: Enter the name of your event in the title box you have not already done so.

Tags: Under the Tags block click one of appropriate options to be used for your event. For a meeting click Meeting, for a trip Click trip. The Tag you click will appear in the Tag block. **You should not need to type in any other value so please DO NOT.**

Tags determine which web page an Event opens on from the Webpage Main menu, Meetings & Activities, Trips or Event Lists.

Location: Enter the location of your event – For Example – Backyard Brewery, or Jackson Hole.

Enter the Dates for the Event – For a meeting Enter the date and Start and End Times.

For a trip Enter the start and return Dates.

Guests: Leave un-checked for a trip; Click the Check box if guests can register for meetings.

Cancellation: Click this button to prevent trip registrants from Cancelling.

Click Save to save your work.

Event Description Block

Click Edit again to begin entering your events description, or paste the material prepared in Word or some other editor.

Format Controls - Notice the greyed format controls at the top of the description box.

Once you type or paste your description in the box the text editing controls at the top will no longer be greyed. You can now use these controls to edit and format your description.

Notice the **“More”** option to the right of the format controls, you will find Copy & Paste options, Insert for an image, a Link symbol, plus other options.

If the format controls become greyed again just click in the description block to make them appear.

Event Setup & Management Guide for Wild Apricot

Link to File

Notice the chain link icon in the format section at the top of the description section. If you click the link button it will display "Insert or Edit Links". Here you will enter the link information to your pictures or any document. You must highlight the document name prior to clicking the link button

Note you should have had the picture or document file uploaded as described above.

Link Format Samples

Link format: `/resources/Documents/foldername/(optional foldername)/filename.pdf`

Link example: `/resources/Documents/Yr_2022/Smuggs/Smugglers_2022.pdf`

Emails Tab

Event Announcement emails are automatically generated from the description you enter for your event. So it is not necessary to make any changes to emails in this section.

DO NOT EDIT ANY EMAILS IN THIS SECTION AS IT WILL IMPACT AND CHANGE ANY AND ALL EMAILS FOR EVERY OTHER EVENT.

The **ONLY** thing one needs to do within the email Tab is schedule the Event Announcement and Reminders.

Notice the **Send Now** and **Schedule** buttons for each Announcement and each Reminder. Your Announcement can be sent immediately or Scheduled for a later time.

You can also schedule when follow up event announcements or reminders need to be sent. Scheduling can be done when the event is created or at a later date.

Notice the Options to be notified when each Attendee signs. You may want to uncheck this if you do not want to see and receive all those emails

Test Message – You can also send a test message to a selected audience that you select. This will of course show you what your intended audience will receive.

Registrants & Invitees

This tab will display a list of names for those who have signed up for the Event.

You can use the **Reports Button** shown at the top of this tab to obtain a list of those who have signed up.

Waitlist & Settings

Only used in the event there is a wait list for extra bookings.