Personify® WildApricot

Wild Apricot – Tips and Tricks

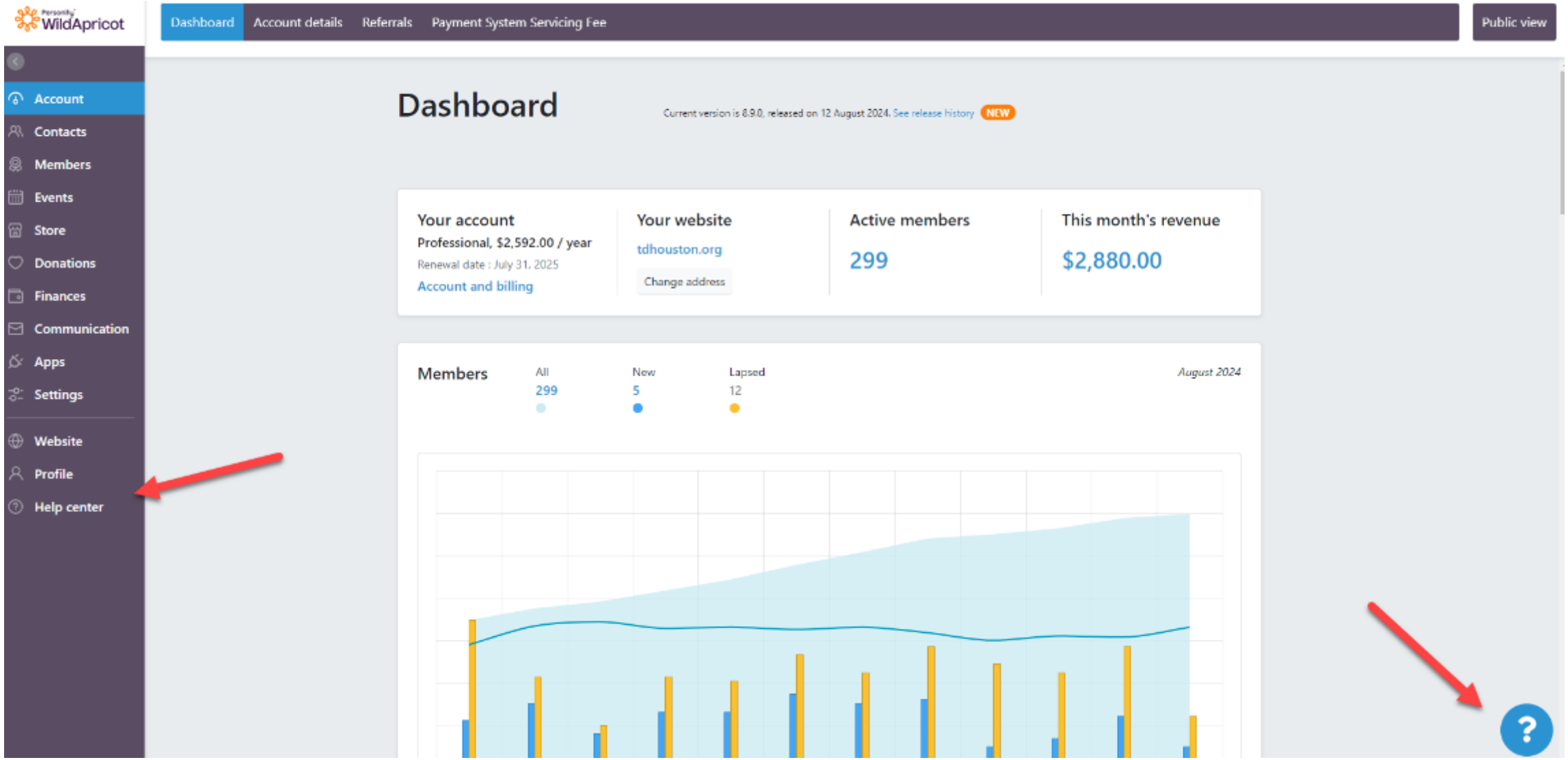
Debbie Richards, President Emeritus

ATD Houston

atd HOUSTON CHAPTER Association for Talent Development

https://www.linkedin.com/in/cre8iveii/

presidentemeritus@tdhouston.org



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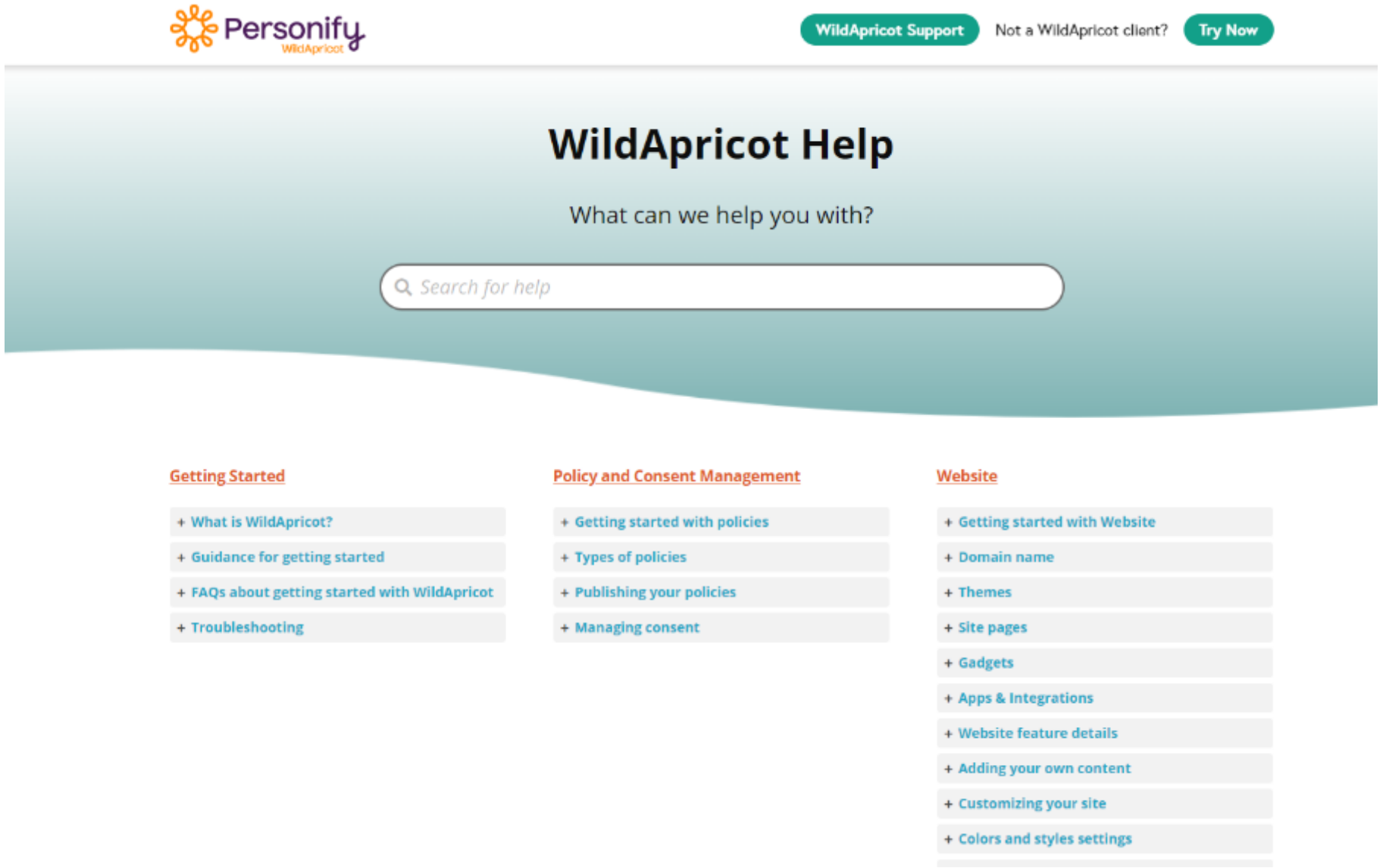
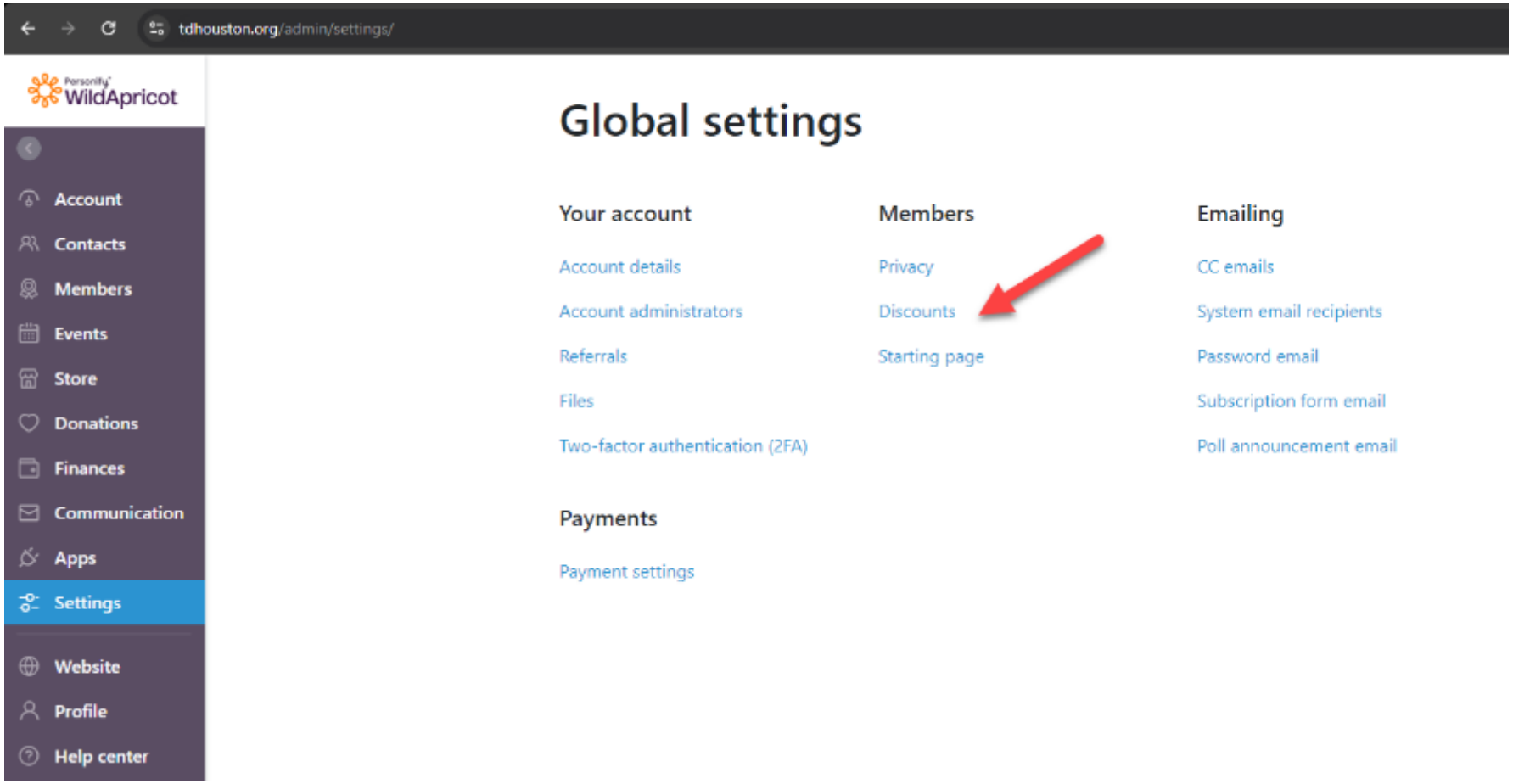


https://gethelp.wildapricot.com/en

Wild Apricot Help and Resources

- Are you using Help?
- Have you taken a Wild Apricot webinar or used resources on the website?



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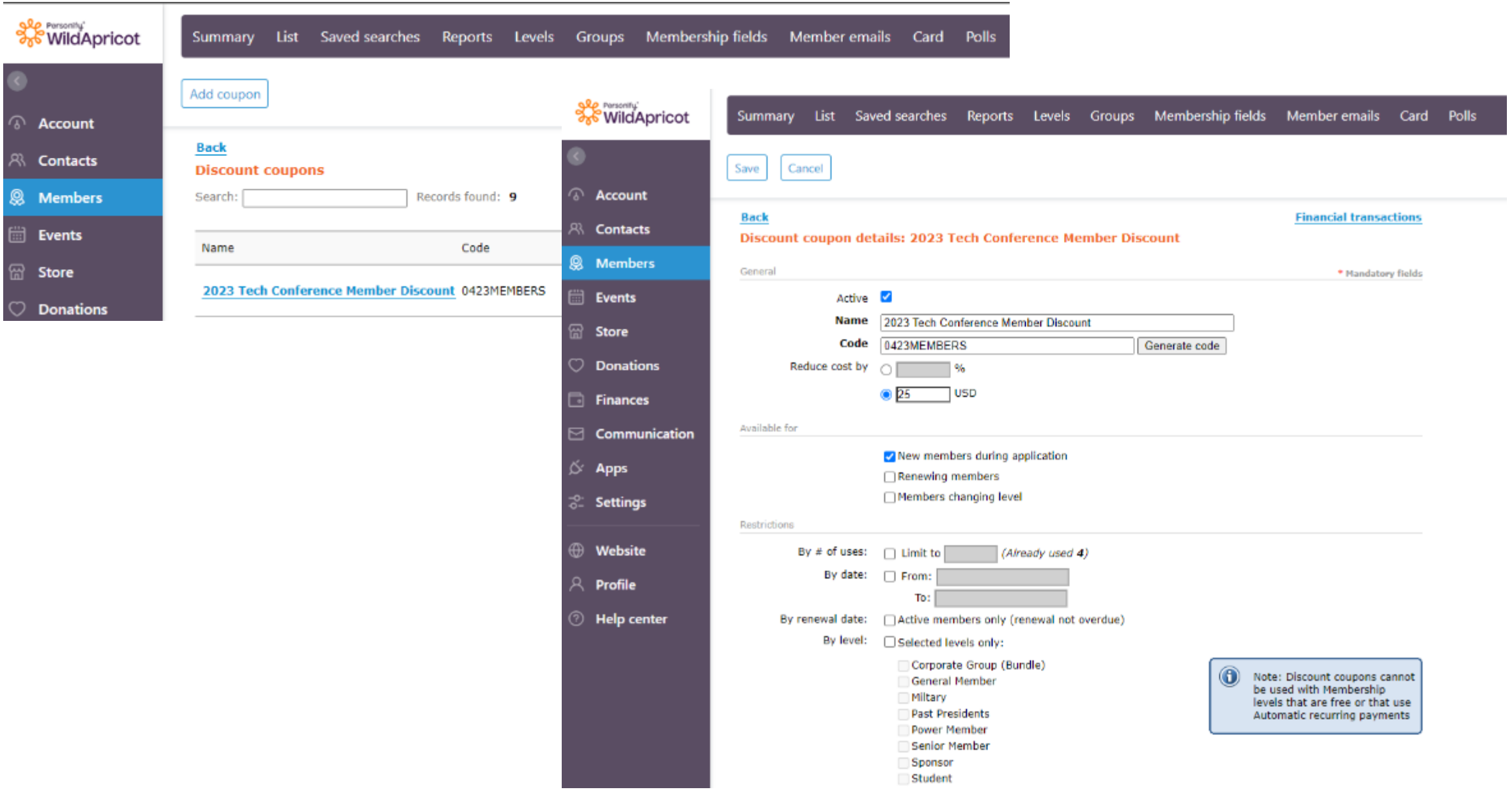

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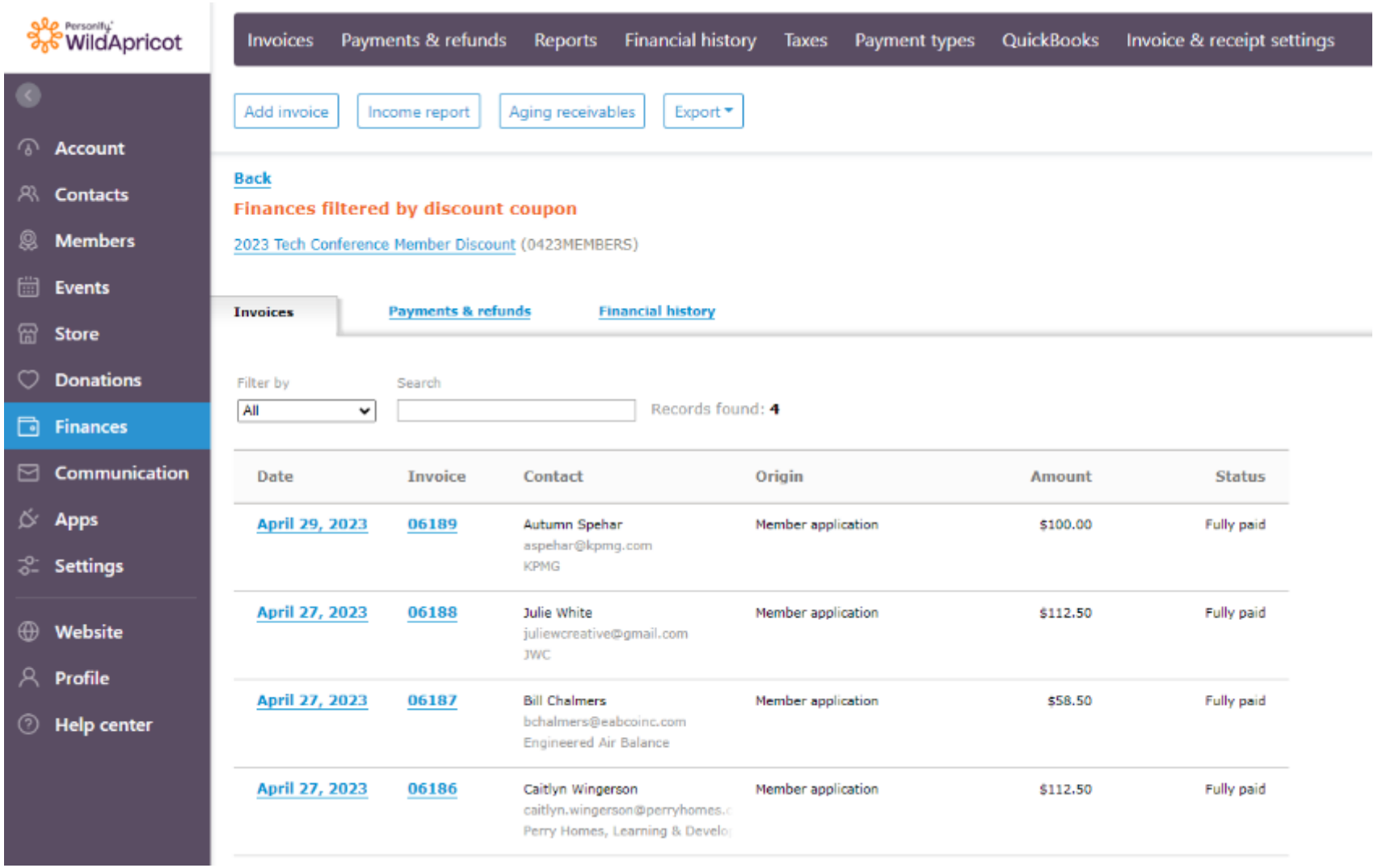

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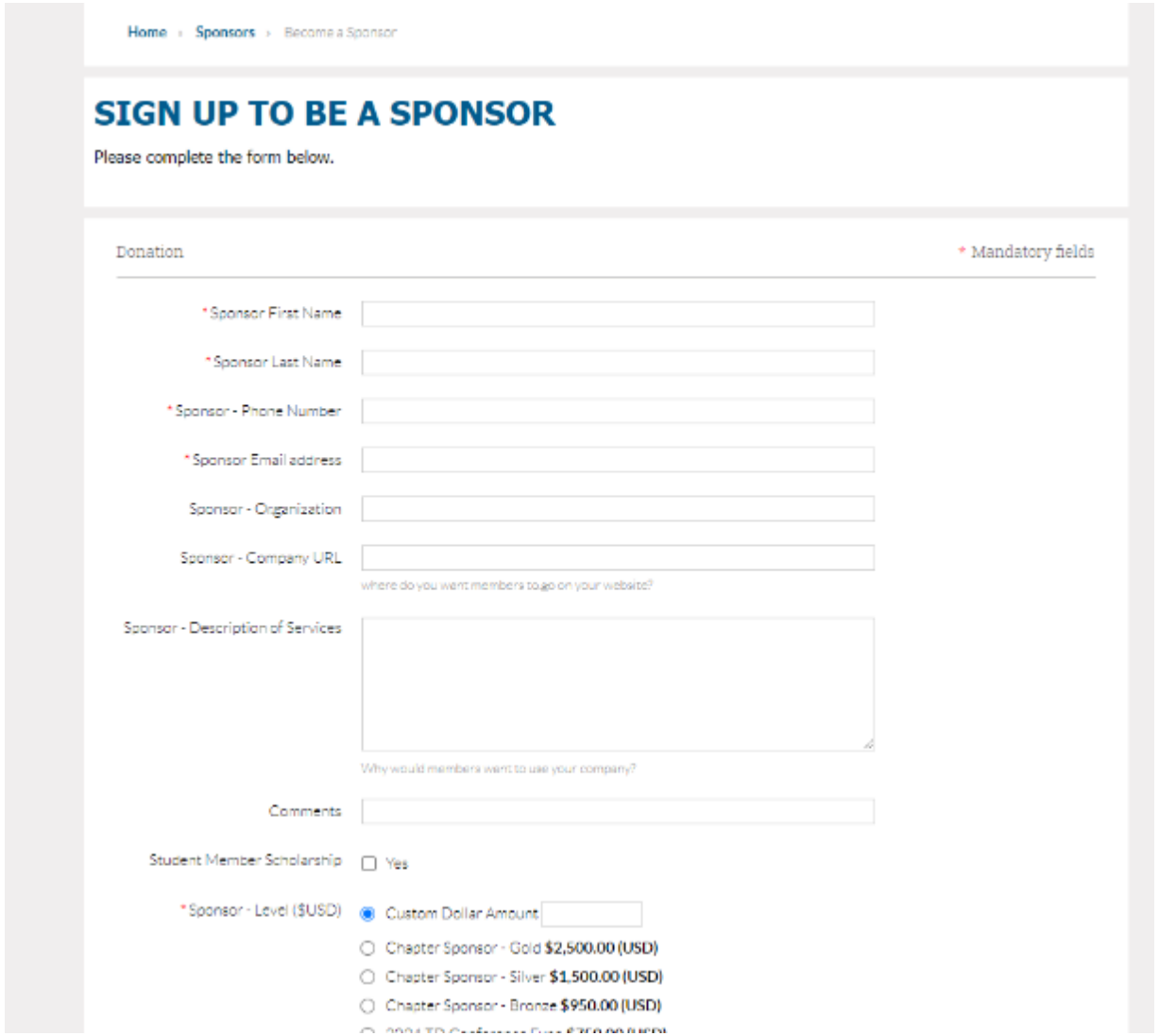

Home › Sponsors › Become a Sponsor

SIGN UP TO BE A SPONSOR

Please complete the form below.

Donation

* Mandatory fields

* Sponsor First Name

* Sponsor Last Name

* Sponsor - Phone Number

* Sponsor Email address

Sponsor - Organization

Sponsor - Company URL

where do you want members to go on your website?

Sponsor - Description of Services

Why would members want to use your company?

Comments

Student Member Scholarship

Yes

* Sponsor - Level ($USD)

Custom Dollar Amount

Chapter Sponsor - Gold **$2,500.00 (USD)**

Chapter Sponsor - Silver **$1,500.00 (USD)**

Chapter Sponsor - Bronze **$950.00 (USD)**

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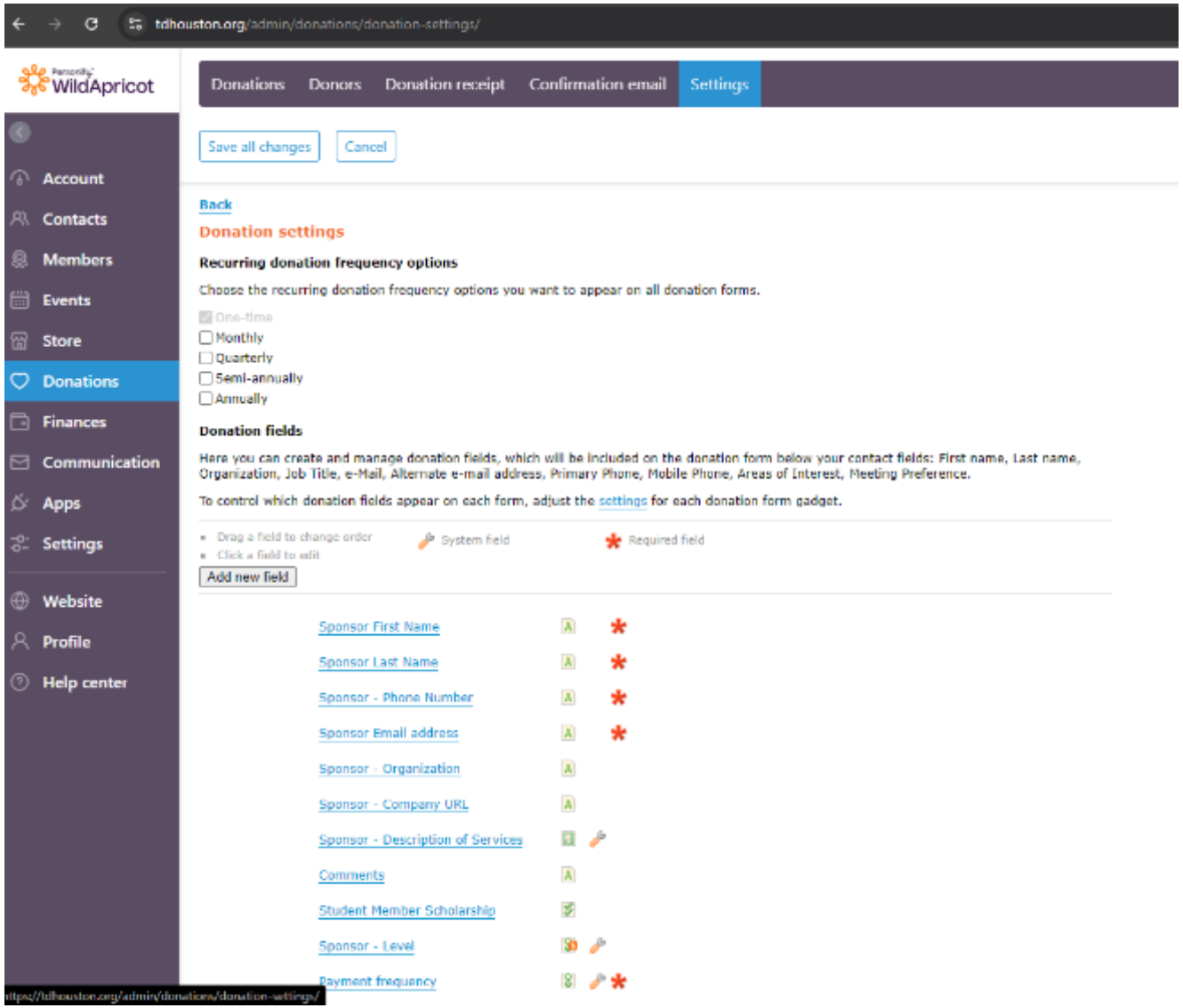

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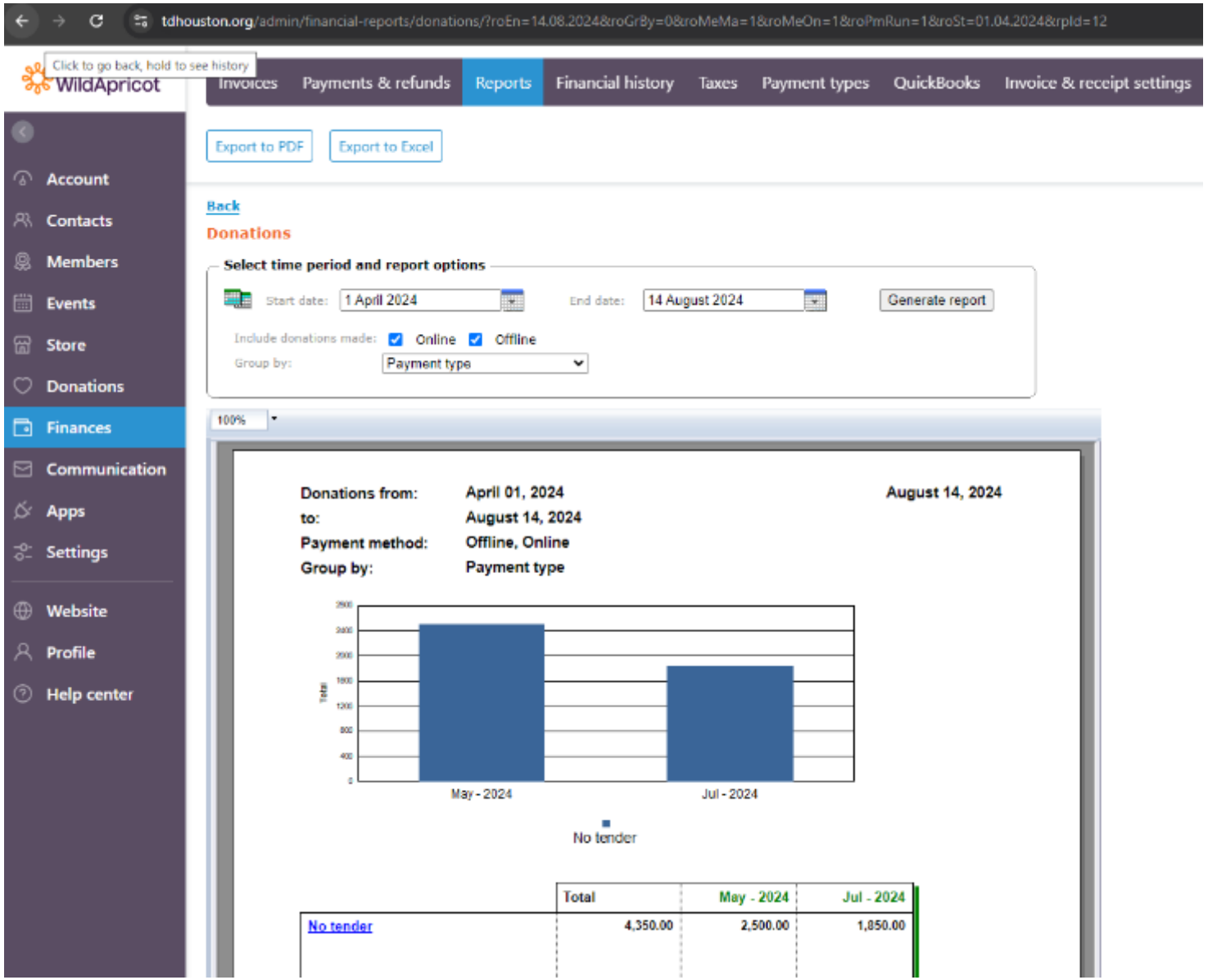

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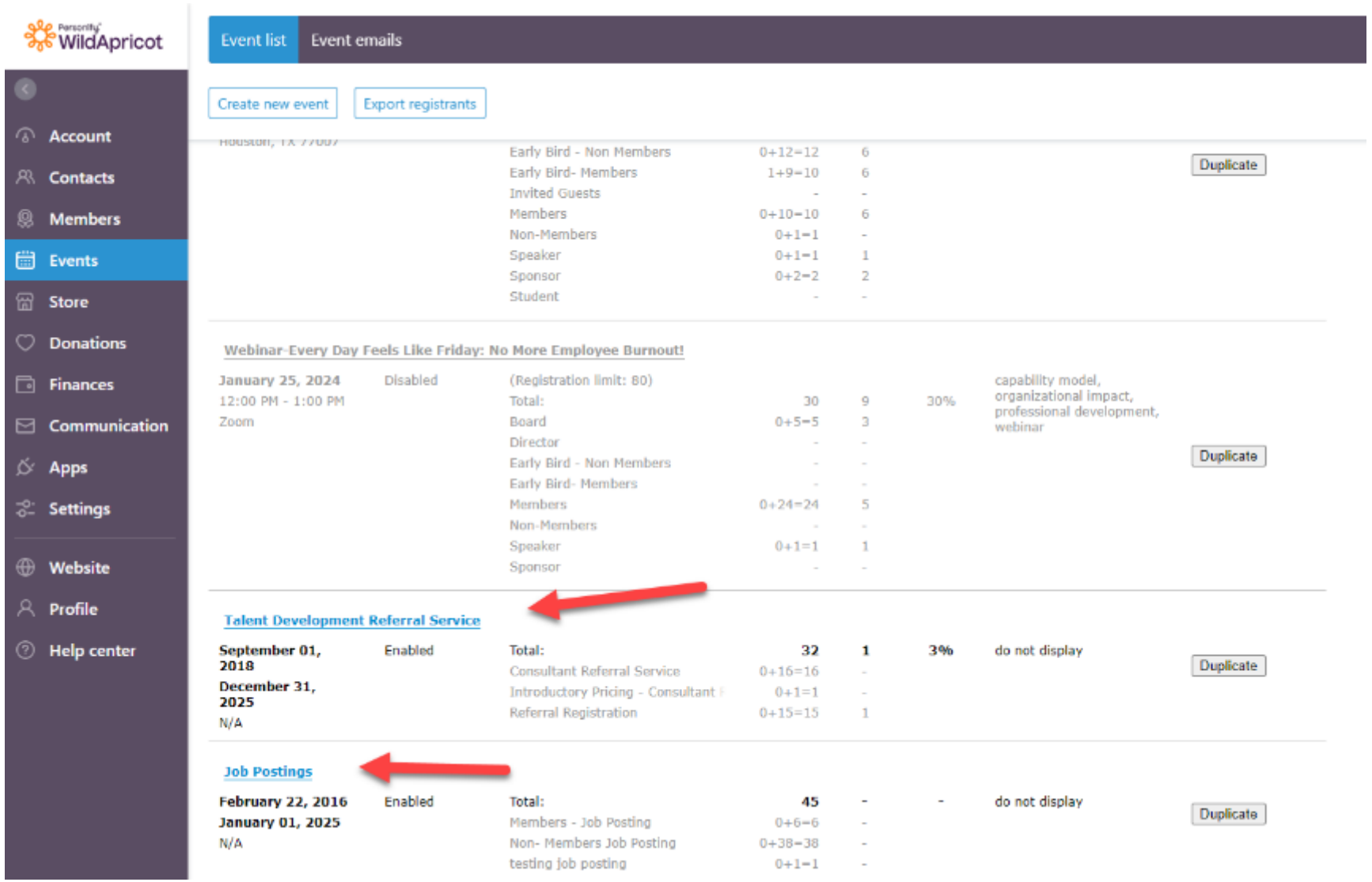

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App for Members

Mobile App Member Directory

Encourage your members to connect

If you're looking to increase engagement and communication among your members, encourage them to download the free Wild Apricot App for Members on iOS or Android.

With the member app, they can view your organization's member directory and member profiles. Depending on how you choose to build your directory, they can even email and call fellow members, so it's easier for them to stay in touch and build a community.

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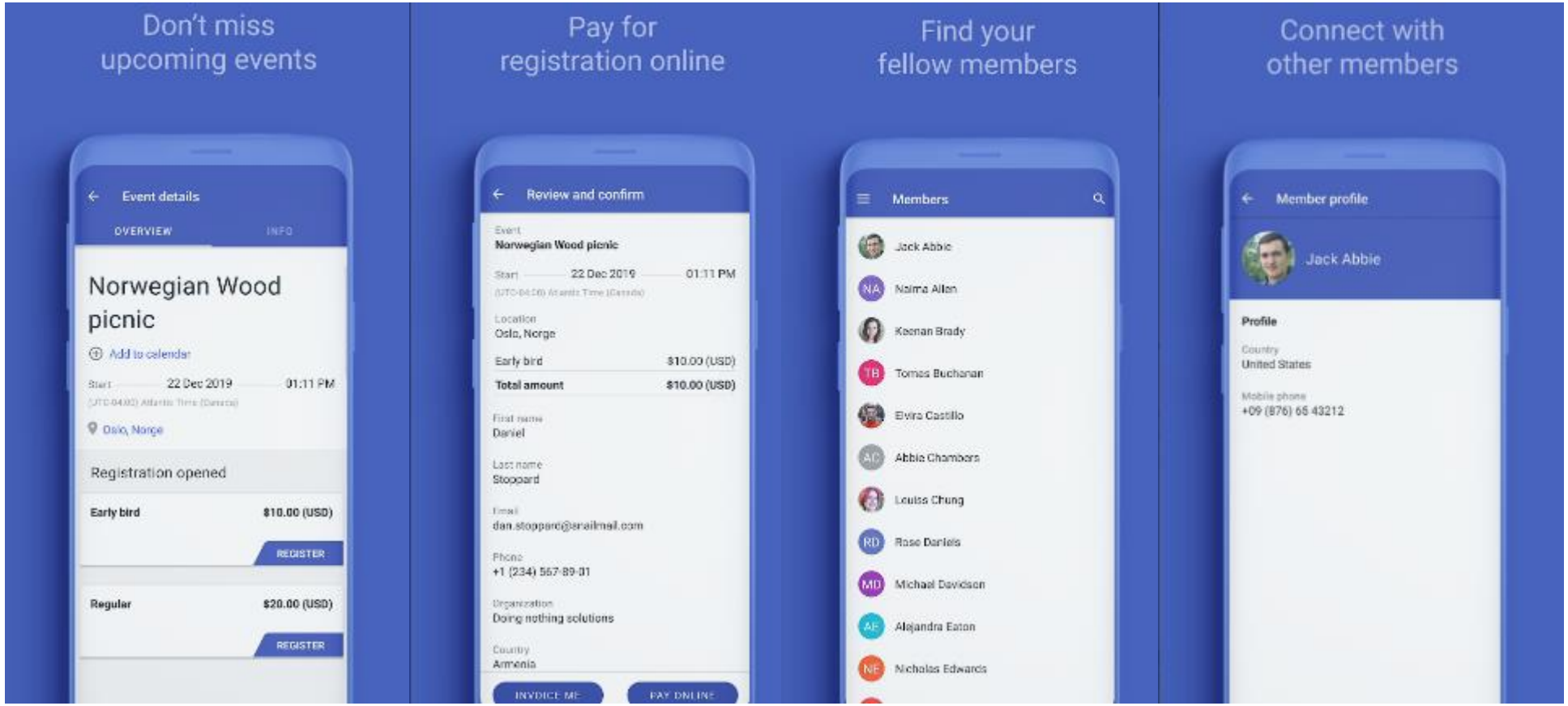

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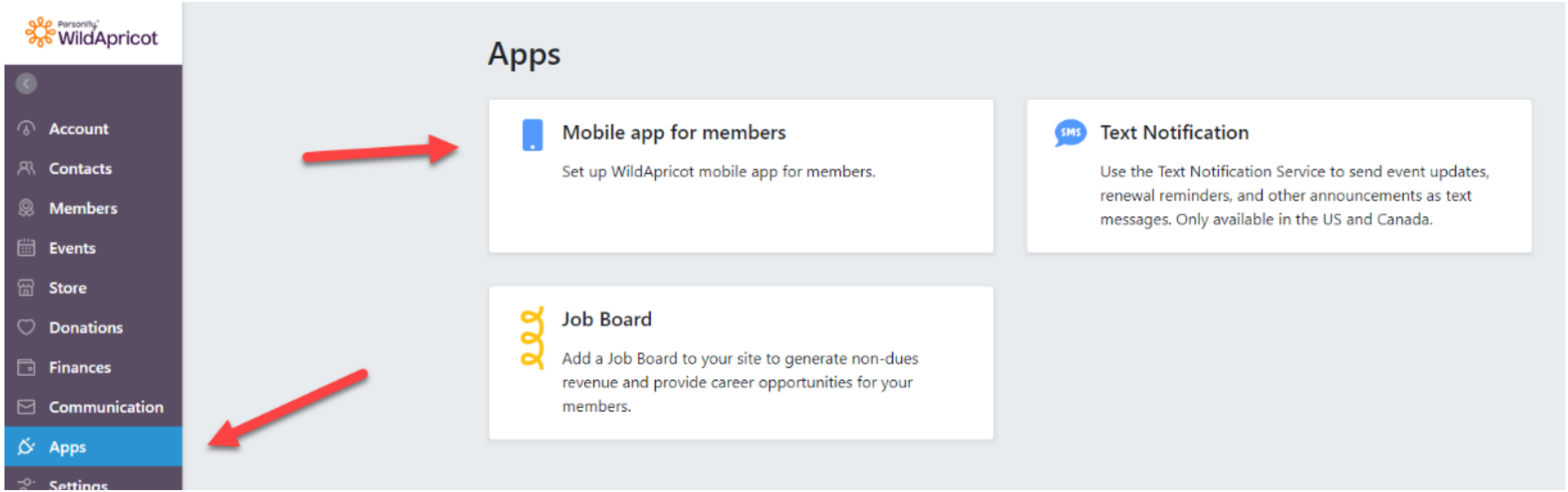

https://gethelp.wildapricot.com/en/articles/1645-mobile-app-for-members-account-settings

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App for Admins

Mobile App Contact Management

Keep your database up to date on the go

If you find that you're always away from the office, you can still effectively manage your contacts. With the app for admins, you can search, view, update and add new contacts to your membership database directly from your mobile device.

You can also set push notifications for when a membership application is pending, so you can approve (or reject) potential members right away. Plus, you can suspend or archive members using the app.

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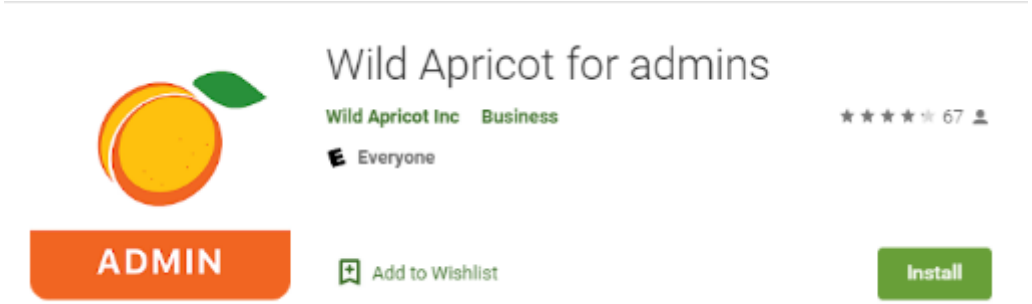
Mobile Apps

- Are you using the member and admin mobile apps?
- Do you promote the app in your member communications?



Personify WildApricot

WildApricot Support | Not a WildApricot client? Try Now

Membership setup checklist

On this page:

- Quick facts
- Step 1: Create a membership level
- Step 2: Set the renewal policy
- Step 3: Create membership database fields
- Step 4: Add members to the database

Quick facts

- Everyone in your WildApricot database is a **contact**.
- **Members** are **contacts** assigned to a **membership level**.
- You can create multiple **membership levels**, each with different membership fees, subscription periods, renewal policies, and membership benefits.
- There are two **types of membership** in WildApricot, and both types can have multiple membership levels.
  - A **bundle** membership is a collection of members charged a single membership fee and managed by a bundle coordinator.
  - An **individual** membership is meant for one member.

This guide helps you build your membership database.

Suggested articles

Membership levels
Membership bundles
Membership emails
Membership renewal settings
Membership application form

Getting started with Membership

Membership setup checklist

https://gethelp.wildapricot.com/en/articles/122-membership-setup-checklist

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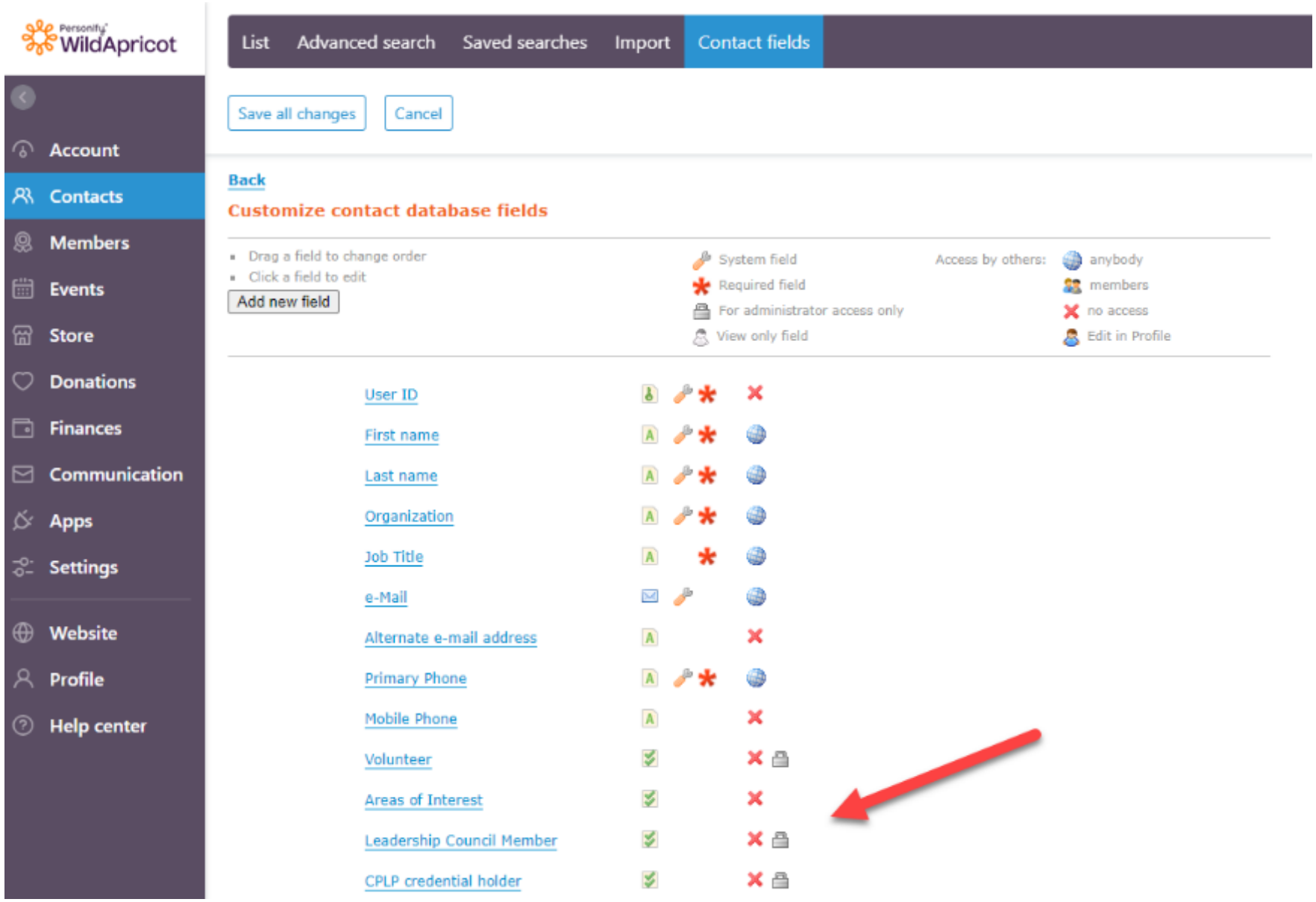

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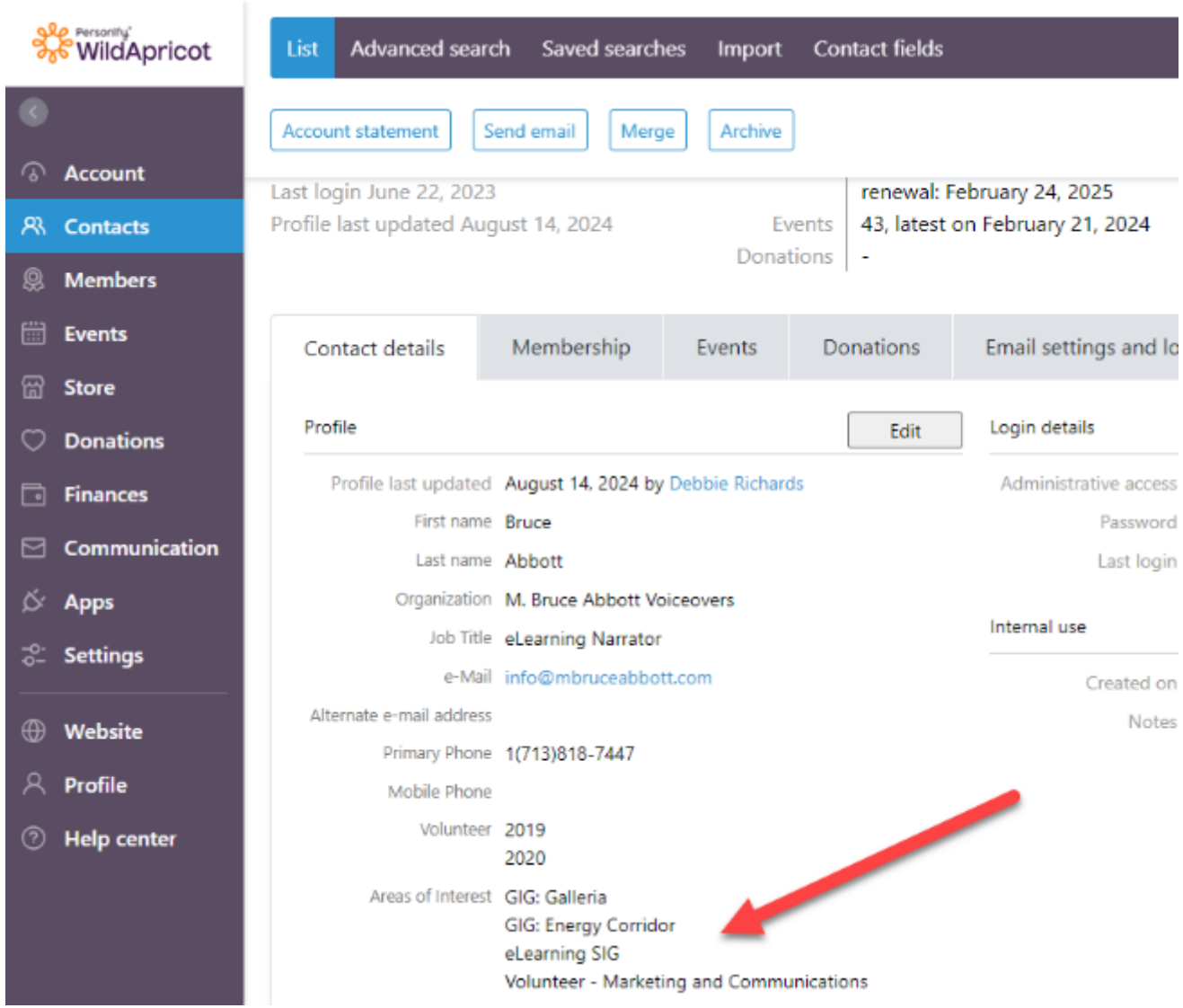

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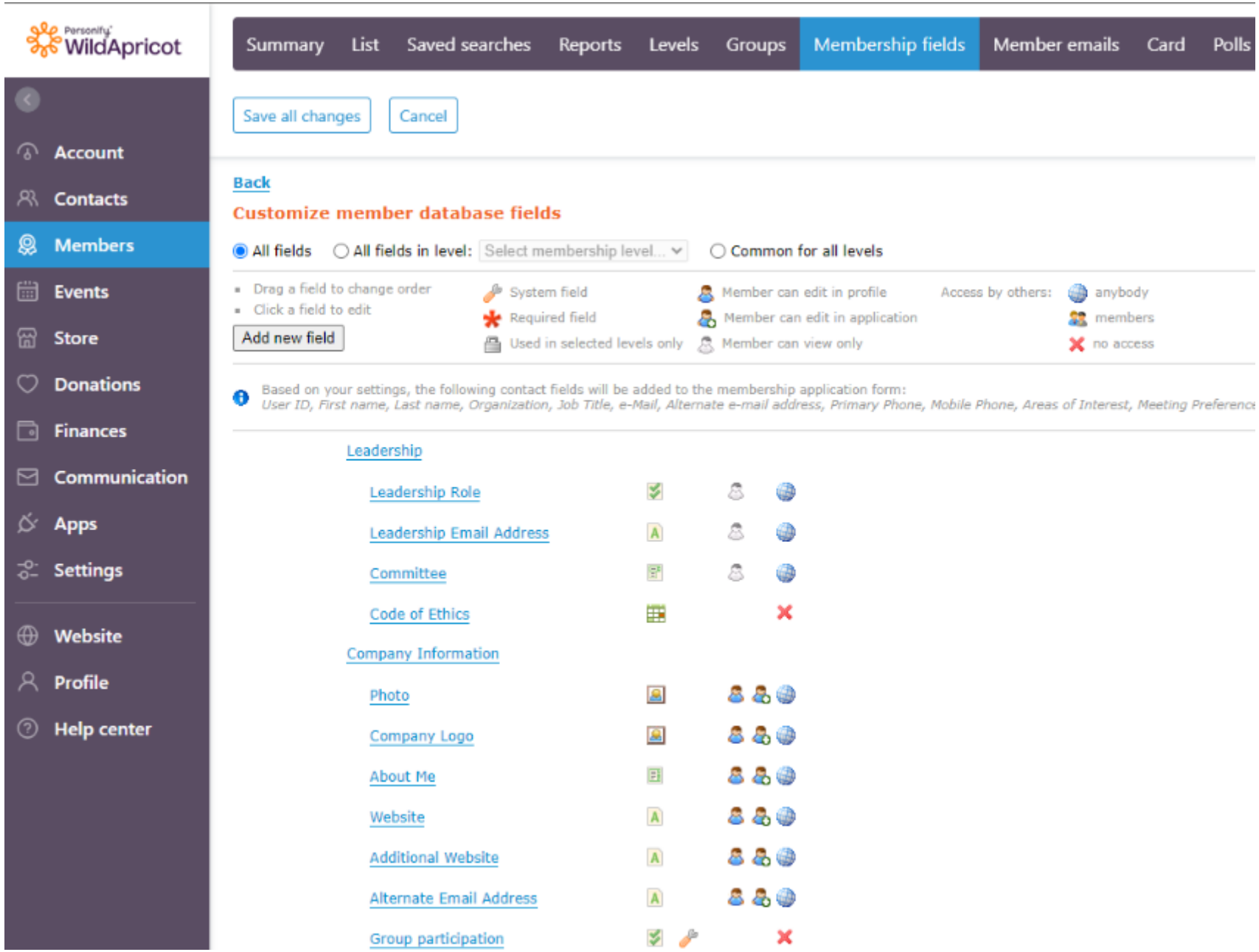

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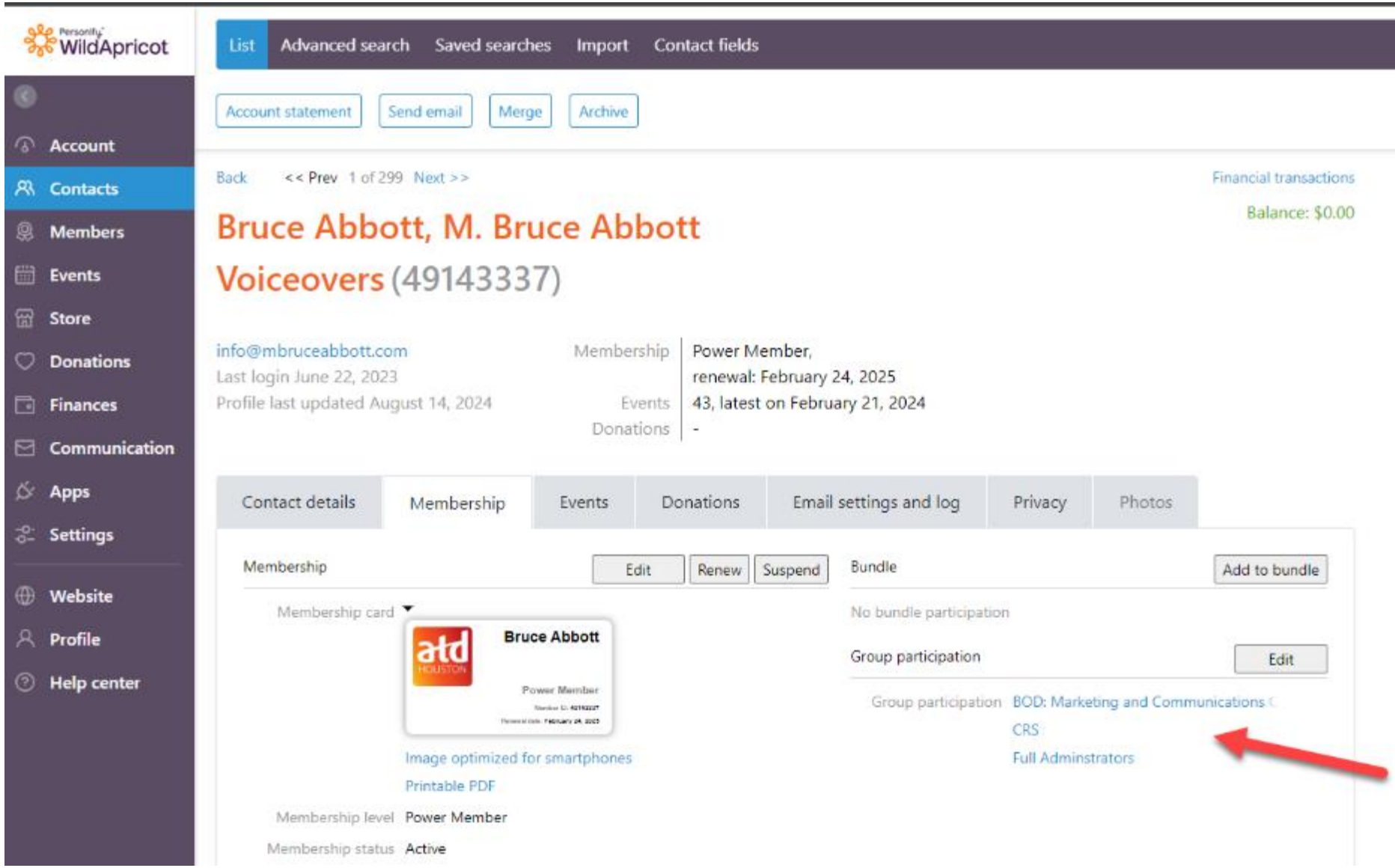

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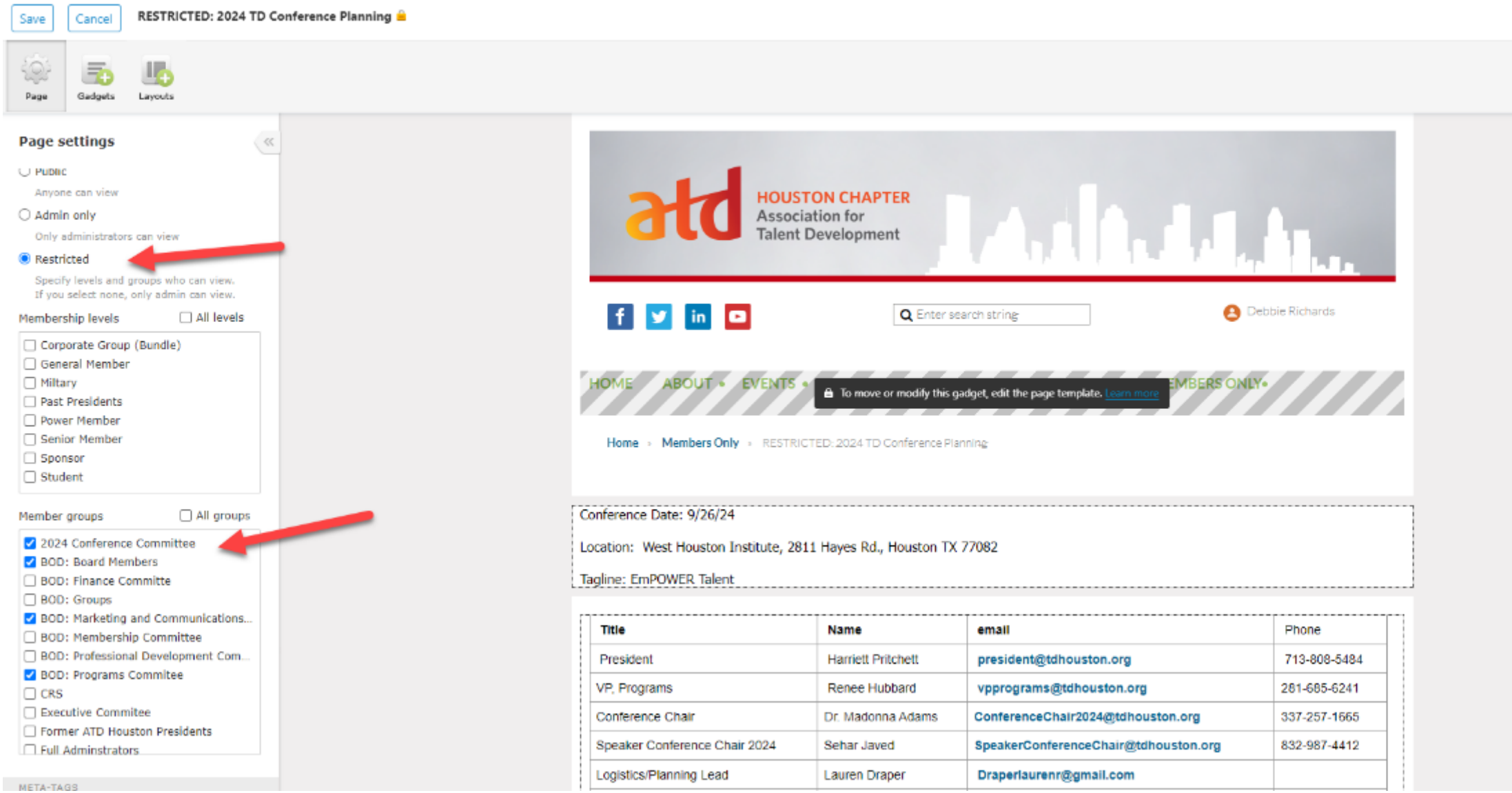
Back

Group management

Add new group

Group name	Description	Participants	
2024 Conference Committee		11	Remove
BOD: Board Members	This group includes members of the board of your organization. You can control groups by going to Settings -> Membership -> Group Management.	9	Remove
BOD: Finance Committe		1	Remove
BOD: Groups		2	Remove
BOD: Marketing and Communications Committee		6	Remove
BOD: Membership Committee		5	Remove
BOD: Professional Development Committee		1	Remove
BOD: Programs Commitee		4	Remove
CRS	Consultant referral service	6	Remove
Executive Commitee		4	Remove
Former ATD Houston Presidents		11	Remove
Full Adminstrators		3	Remove
Leadership Council		81	Remove
Sponsors		7	Remove

Add new group


Save
Cancel
RESTRICTED: 2024 TD Conference Planning
Page
Gadgets
Layouts
Page settings
Public
Anyone can view
Admin only
Only administrators can view
Restricted
Specify levels and groups who can view.
If you select none, only admin can view.
Membership levels
All levels
Corporate Group (Bundle)
General Member
Military
Past Presidents
Power Member
Senior Member
Sponsor
Student
Member groups
All groups
2024 Conference Committee
BOD: Board Members
BOD: Finance Committe
BOD: Groups
BOD: Marketing and Communications...
BOD: Membership Committee
BOD: Professional Development Com...
BOD: Programs Commitee
CRS
Executive Commitee
Former ATD Houston Presidents
Full Adminstrators
META-TAGS
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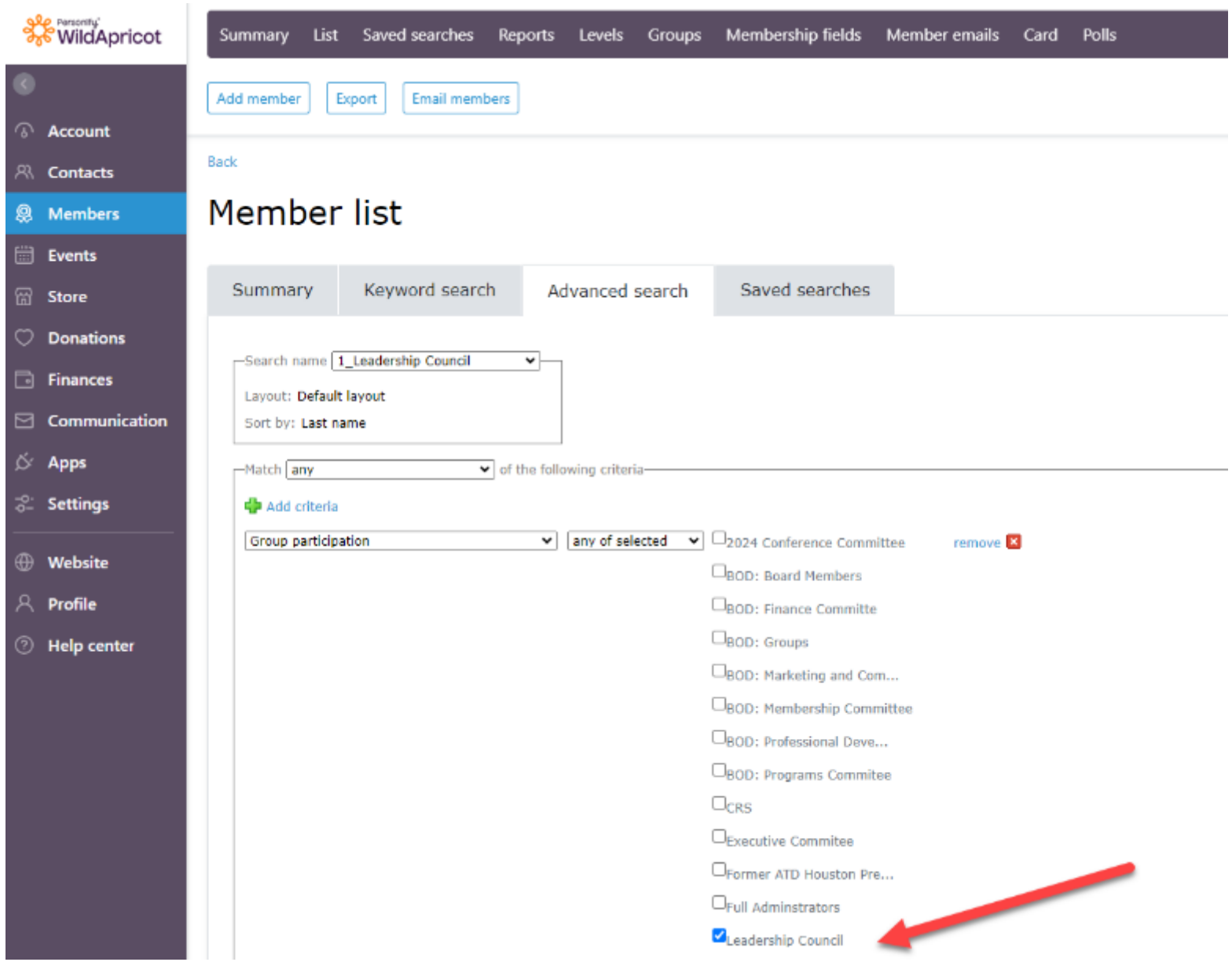
Enter search string
Debbie Richards
HOME
ABOUT
EVENTS
To move or modify this gadget, edit the page template. Learn more
MEMBERS ONLY
Home › Members Only › RESTRICTED: 2024 TD Conference Planning
Conference Date: 9/26/24
Location: West Houston Institute, 2811 Hayes Rd., Houston TX 77082
Tagline: EmPOWER Talent
Title
Name
email
Phone
President
Harriett Pritchett
president@tdhouston.org
713-808-5484
VP, Programs
Renee Hubbard
vpprograms@tdhouston.org
281-685-6241
Conference Chair
Dr. Madonna Adams
ConferenceChair2024@tdhouston.org
337-257-1665
Speaker Conference Chair 2024
Sehar Javed
SpeakerConferenceChair@tdhouston.org
832-987-4412
Logistics/Planning Lead
Lauren Draper
Draperlaurenr@gmail.com



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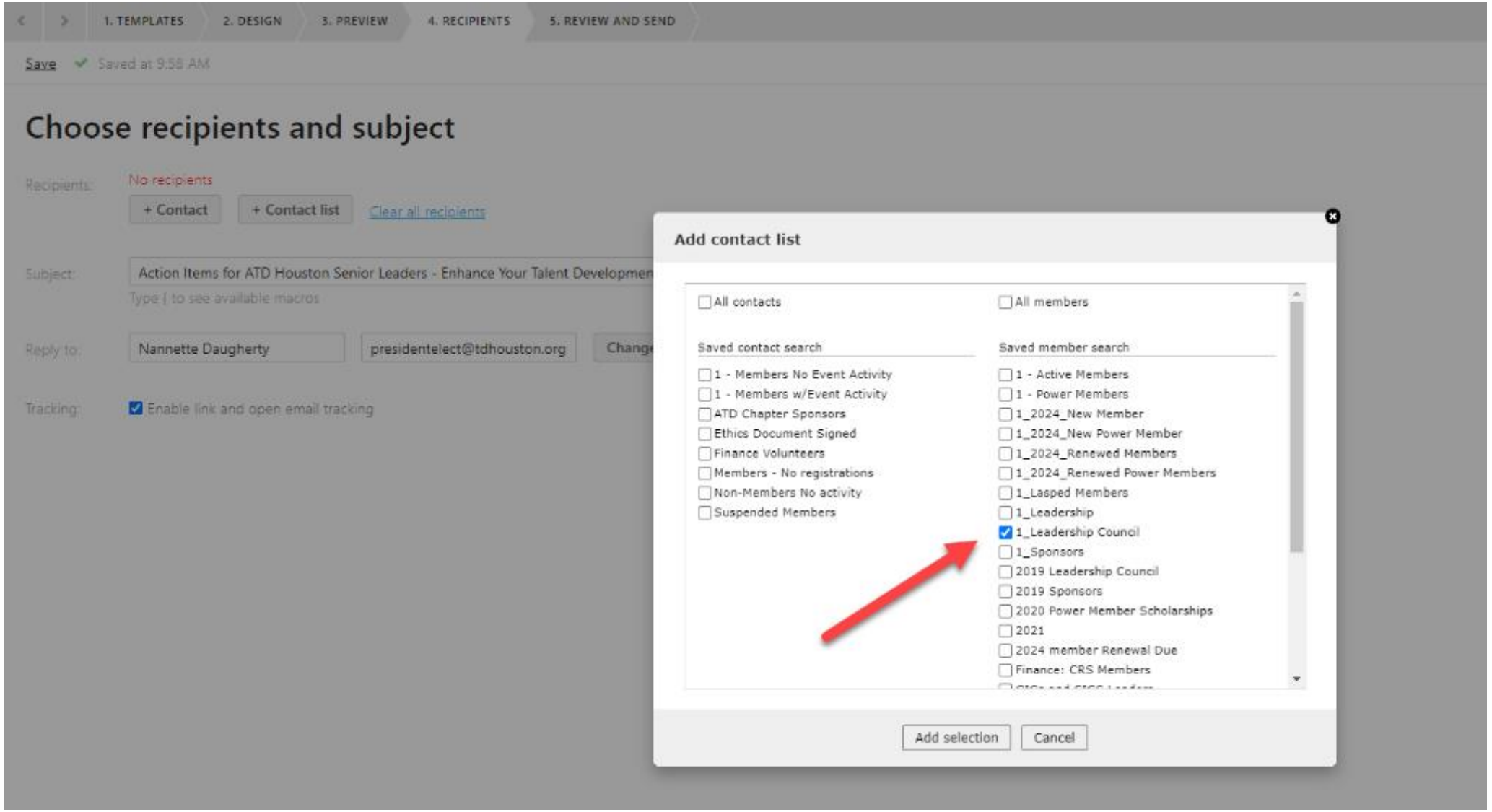

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Suggested articles

- Troubleshooting Events
- Capping event registrations
- Event visibility
- Events setup checklist
- Event details screen

Getting started with Events

Events - Quick links

- Setting up an advanced event
- Setting up a simple event (RSVP only)
- Setting up an online event
- Events setup checklist

Events - Quick links

- Create events and publish them on an events calendar displayed on your WildApricot website. With an events calendar, visitors can access event details, reserve event tickets, register guests, and pay registration fees online.
- Add an upcoming events gadget to a page on your website that provides links and information for each event.
- Use tags to categorize events for display on separate event calendars.
- Customize event registration forms to collect specific information, such as meal selections or seating preference.
- Event registration and calendar visibility can be restricted to select membership levels or groups.
- For events with limited space, you can set a registration limit. Limit the number of registrations for the entire event or just for specific ticket types.

https://gethelp.wildapricot.com/en/articles/201-events-quick-links

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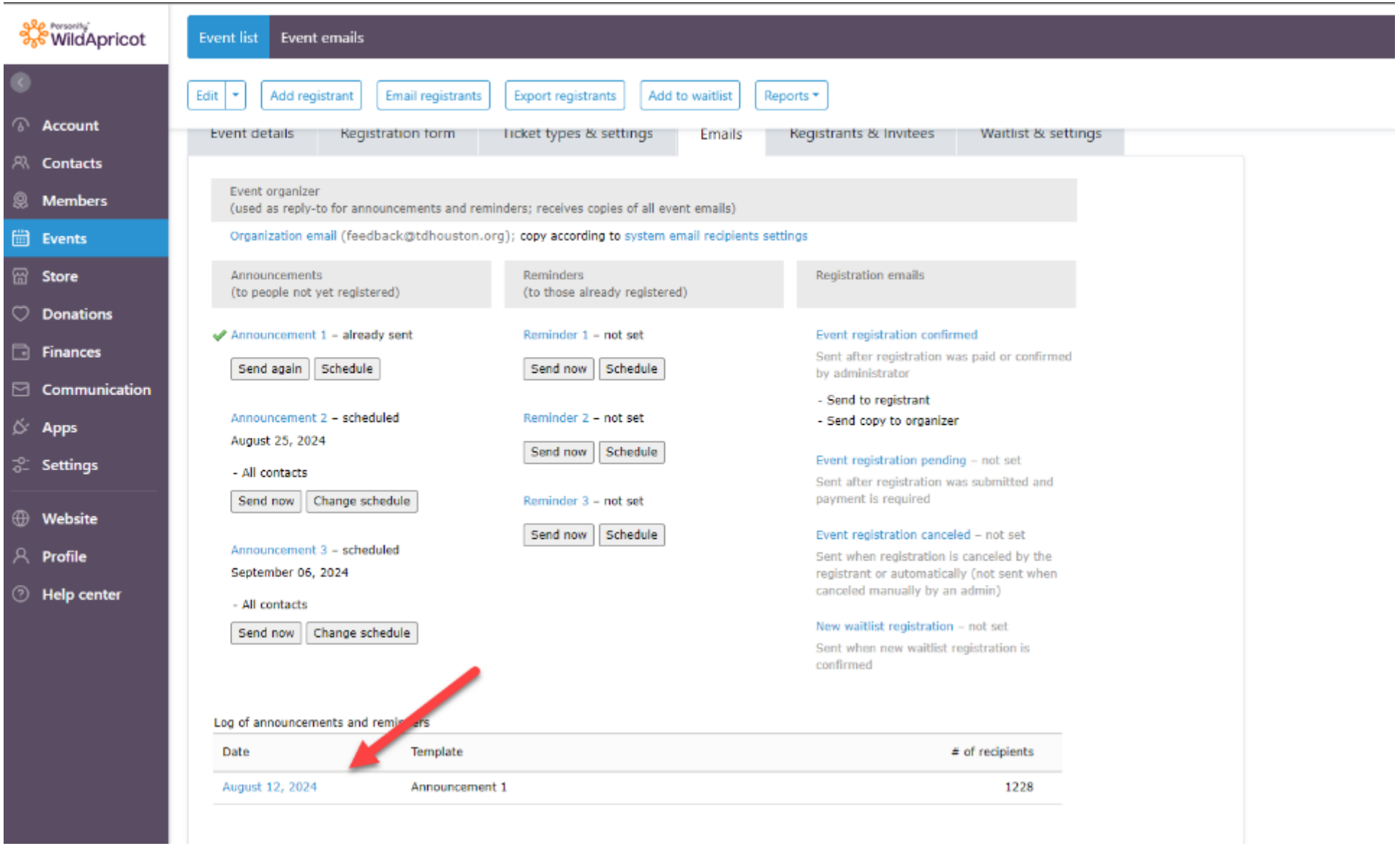
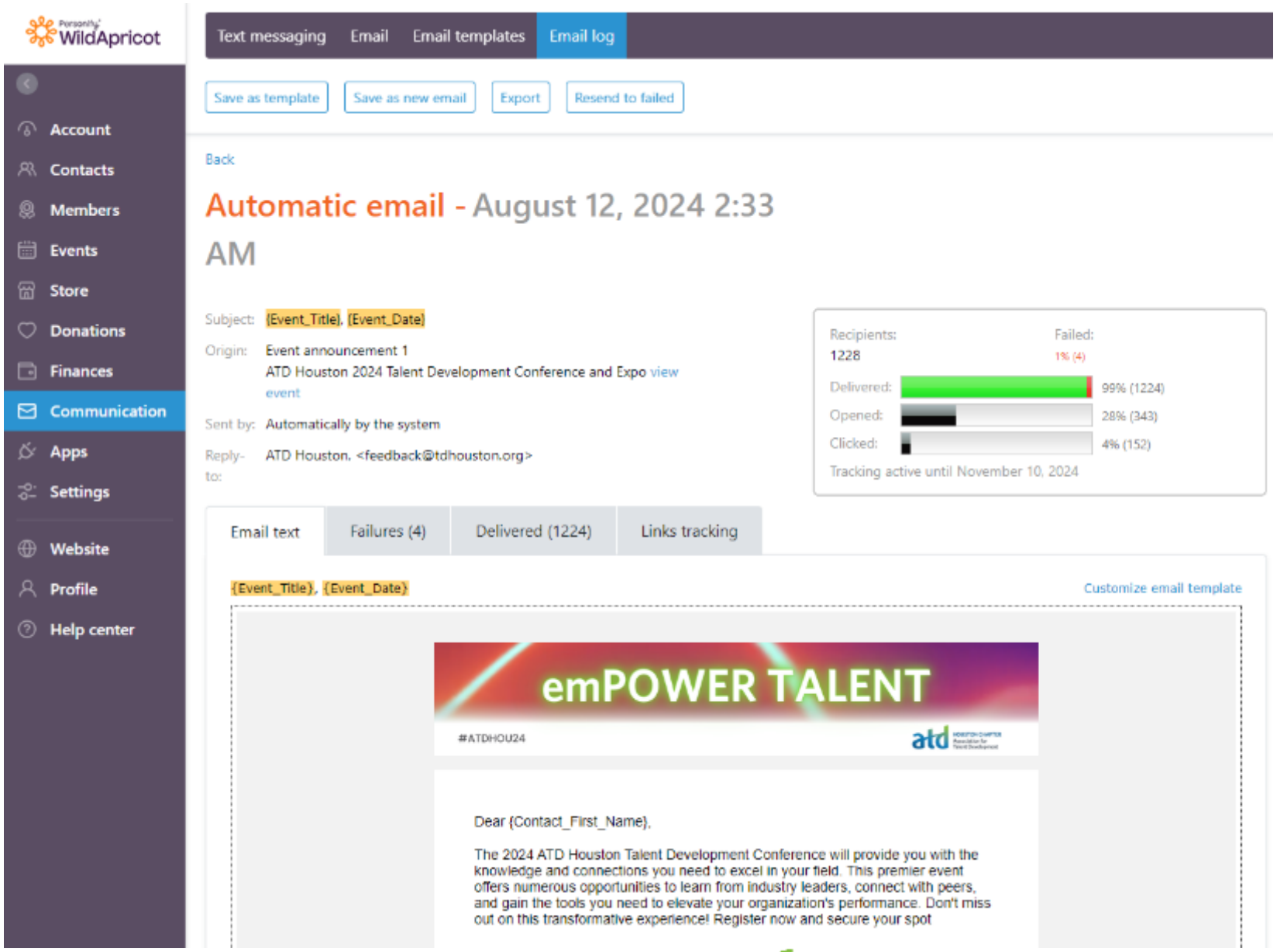

WildApricot
Account
Contacts
Members
Events
Store
Donations
Finances
Communication
Apps
Settings
Website
Profile
Help center
Event list
Event emails
Edit
Add registrant
Email registrants
Export registrants
Add to waitlist
Reports
Event details
Registration form
Ticket types & settings
Emails
Registrants & invitees
Waitlist & settings
Event organizer
(used as reply-to for announcements and reminders; receives copies of all event emails)
Organization email (feedback@tdhouston.org); copy according to system email recipients settings
Announcements
(to people not yet registered)
Reminders
(to those already registered)
Registration emails
Announcement 1 – already sent
Send again
Schedule
Announcement 2 – scheduled
August 25, 2024
- All contacts
Send now
Change schedule
Announcement 3 – scheduled
September 06, 2024
- All contacts
Send now
Change schedule
Reminder 1 – not set
Send now
Schedule
Reminder 2 – not set
Send now
Schedule
Reminder 3 – not set
Send now
Schedule
Event registration confirmed
Sent after registration was paid or confirmed by administrator
- Send to registrant
- Send copy to organizer
Event registration pending – not set
Sent after registration was submitted and payment is required
Event registration canceled – not set
Sent when registration is canceled by the registrant or automatically (not sent when canceled manually by an admin)
New waitlist registration – not set
Sent when new waitlist registration is confirmed
Log of announcements and reminders
Date
Template
# of recipients
August 12, 2024
Announcement 1
1228



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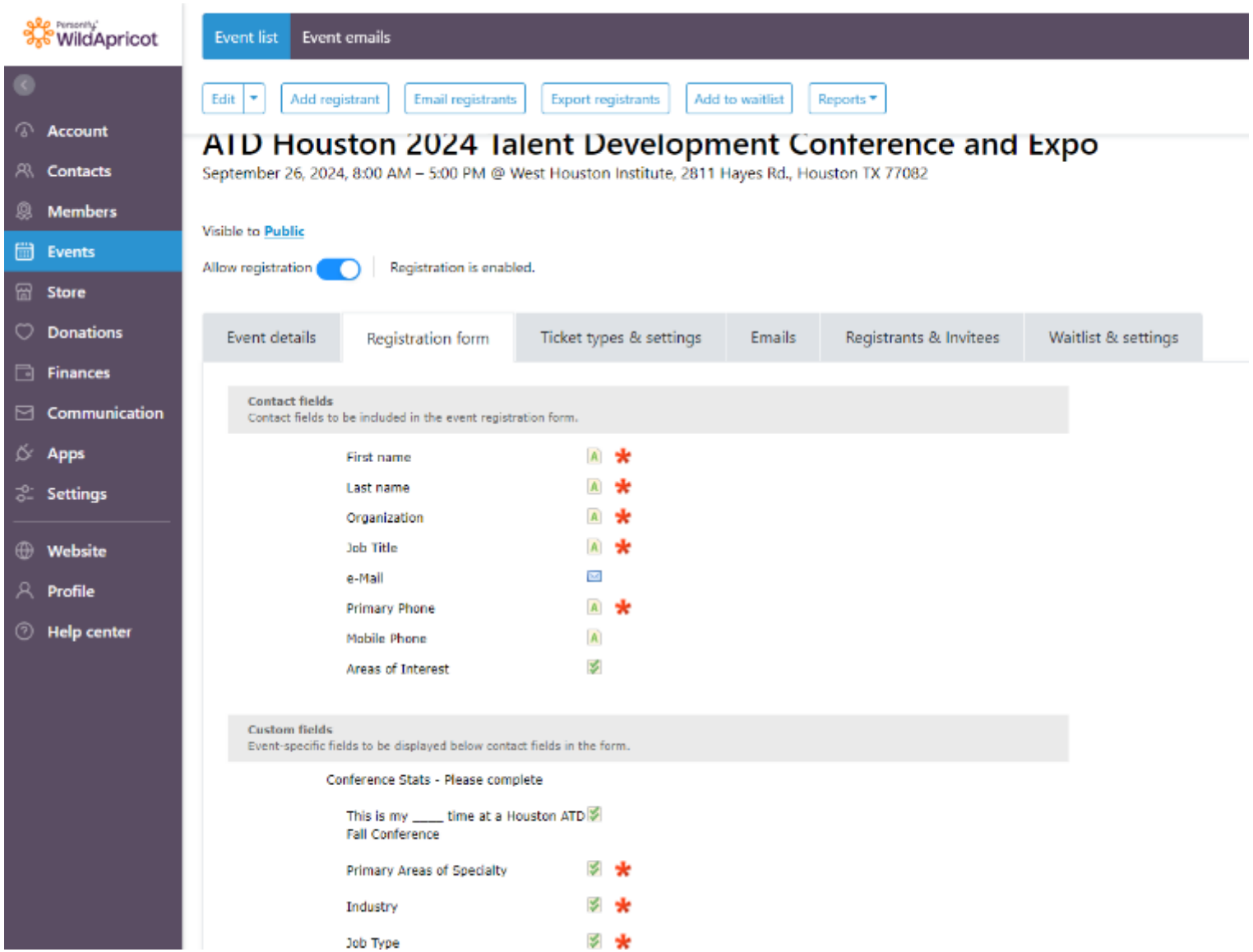

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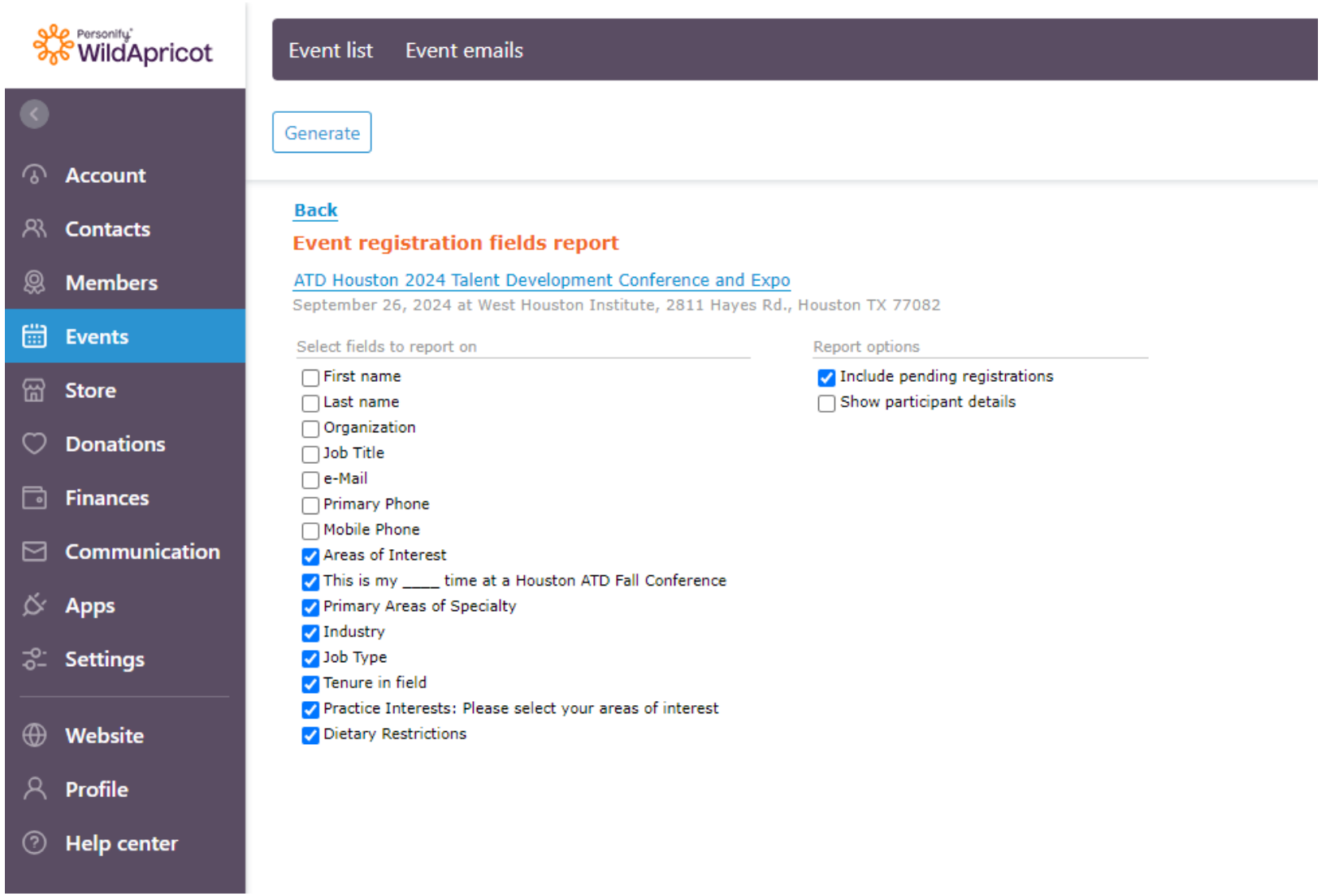

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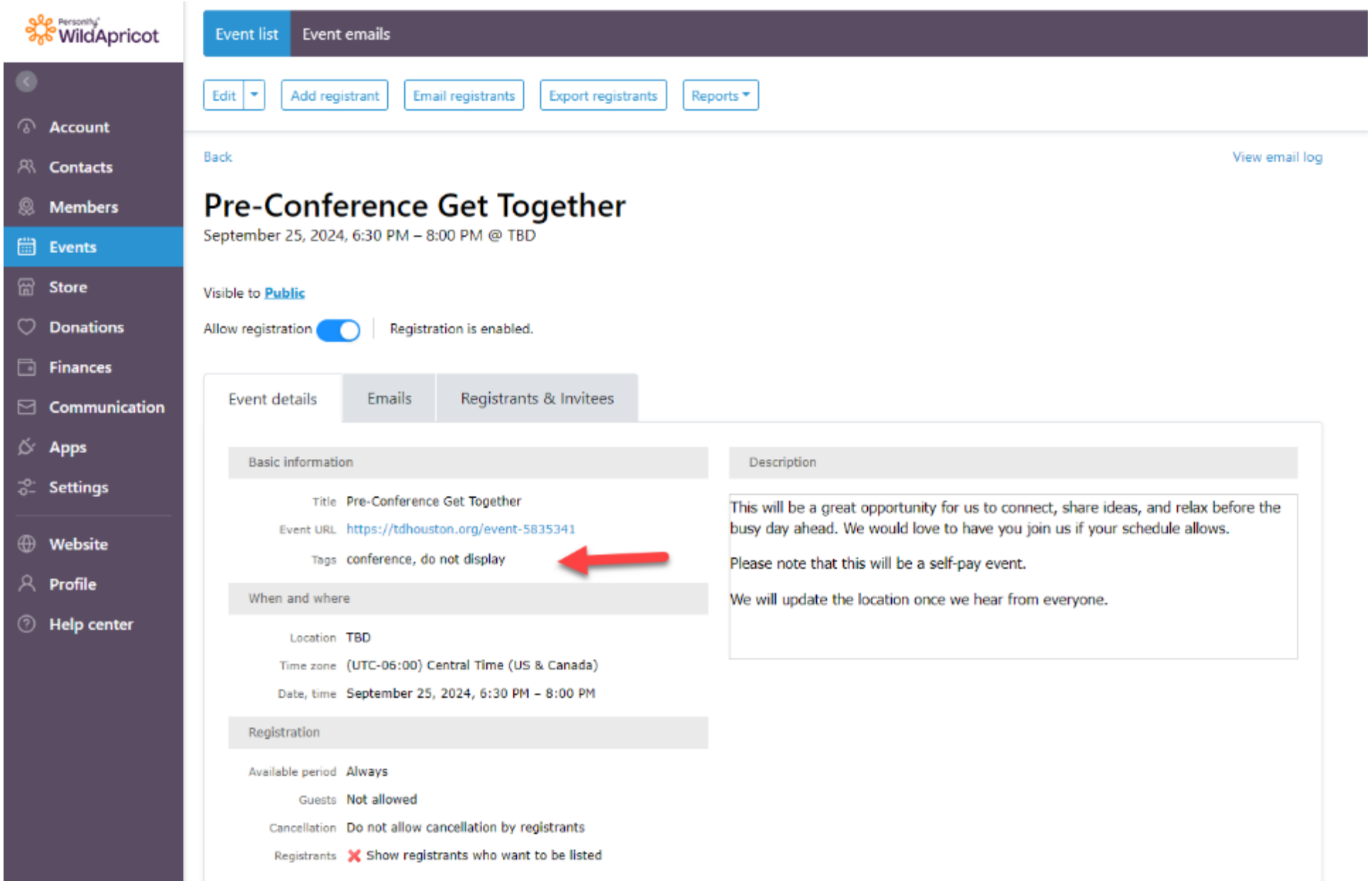

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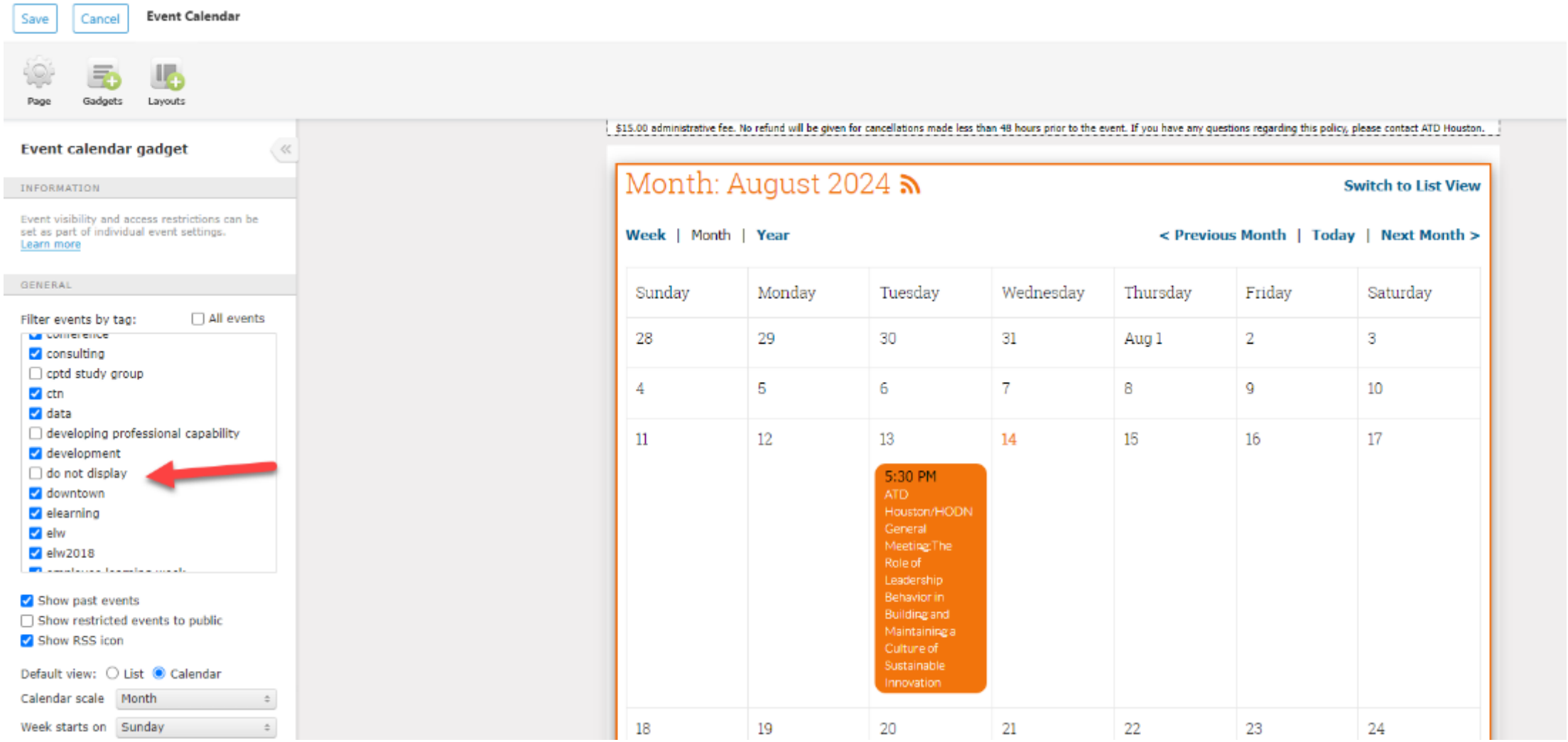

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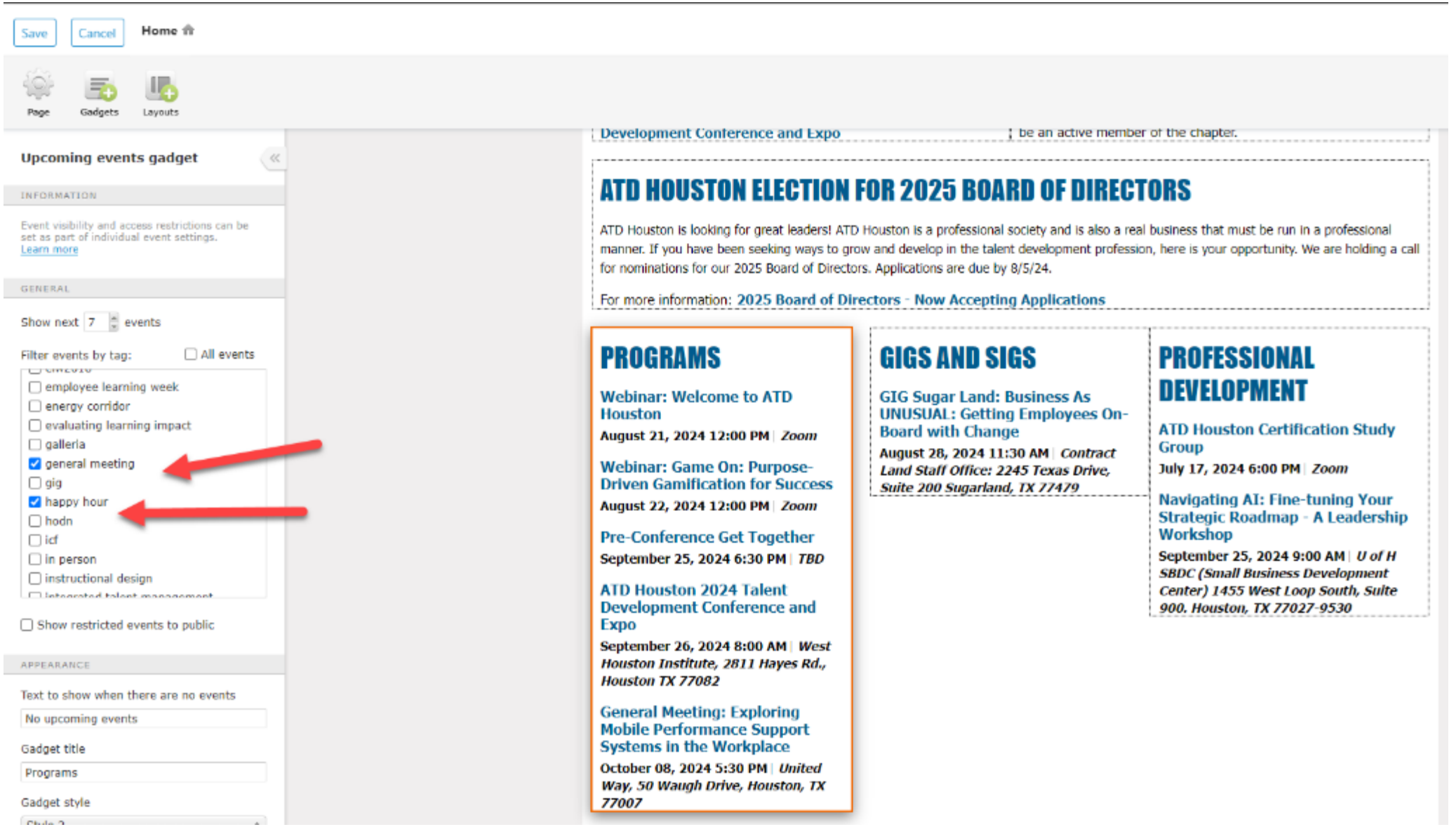
Save
Cancel
Home
Page
Gadgets
Layouts
Upcoming events gadget
INFORMATION
Event visibility and access restrictions can be set as part of individual event settings.
Learn more
GENERAL
Show next 7 events
Filter events by tag:
All events
employee learning week
energy corridor
evaluating learning impact
galleria
general meeting
gig
happy hour
hodn
icf
in person
instructional design
Show restricted events to public
APPEARANCE
Text to show when there are no events
No upcoming events
Gadget title
Programs
Gadget style
Development Conference and Expo
be an active member of the chapter.
ATD HOUSTON ELECTION FOR 2025 BOARD OF DIRECTORS
ATD Houston is looking for great leaders! ATD Houston is a professional society and is also a real business that must be run in a professional manner. If you have been seeking ways to grow and develop in the talent development profession, here is your opportunity. We are holding a call for nominations for our 2025 Board of Directors. Applications are due by 8/5/24.
For more information: 2025 Board of Directors - Now Accepting Applications
PROGRAMS
Webinar: Welcome to ATD Houston
August 21, 2024 12:00 PM | Zoom
Webinar: Game On: Purpose-Driven Gamification for Success
August 22, 2024 12:00 PM | Zoom
Pre-Conference Get Together
September 25, 2024 6:30 PM | TBD
ATD Houston 2024 Talent Development Conference and Expo
September 26, 2024 8:00 AM | West Houston Institute, 2811 Hayes Rd., Houston TX 77082
General Meeting: Exploring Mobile Performance Support Systems in the Workplace
October 08, 2024 5:30 PM | United Way, 50 Waugh Drive, Houston, TX 77007
GIGS AND SIGS
GIG Sugar Land: Business As UNUSUAL: Getting Employees On-Board with Change
August 28, 2024 11:30 AM | Contract Land Staff Office: 2245 Texas Drive, Suite 200 Sugarland, TX 77479
PROFESSIONAL DEVELOPMENT
ATD Houston Certification Study Group
July 17, 2024 6:00 PM | Zoom
Navigating AI: Fine-tuning Your Strategic Roadmap - A Leadership Workshop
September 25, 2024 9:00 AM | U of H SBDC (Small Business Development Center) 1455 West Loop South, Suite 900. Houston, TX 77027-9530

Month: August 2024

Switch to List View

Week | Month | Year

< Previous Month | Today | Next Month >

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	31	Aug 1	2	3
4	5	6	7	8	9	10
11	12	13 5:30 PM ATD Houston/HODN General Meeting:The Role of Leadership Behavior in Building and Maintaining a Culture of Sustainable Innovation	14	15	16	17
18	19	20	21 12:00 PM Webinar: Welcome to ATD Houston	22 12:00 PM Webinar: Game On: Purpose-Driven Gamification for Success	23	24
25	26	27	28 11:30 AM GIG Sugar Land: Business As UNUSUAL: Getting Employees On-Board with Change	29	30	31

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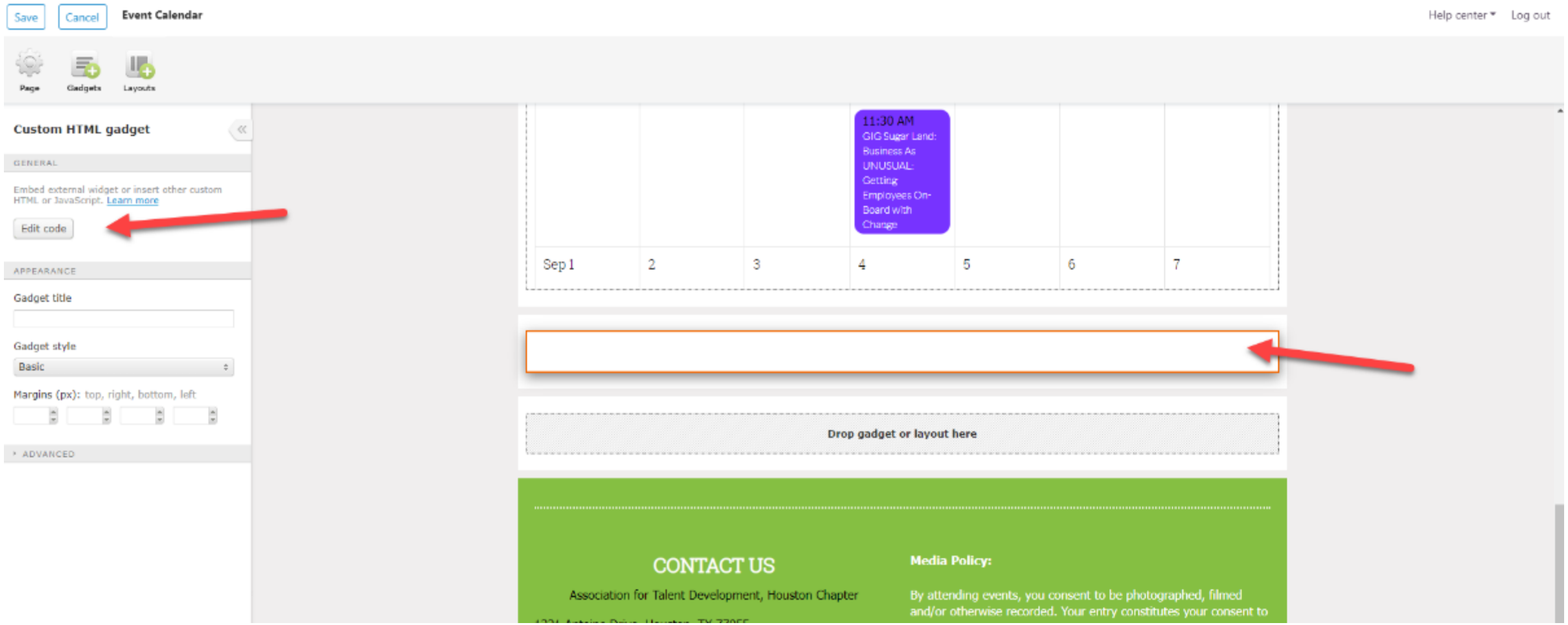

https://gethelp.wildapricot.com/en/articles/94-event-tags#color

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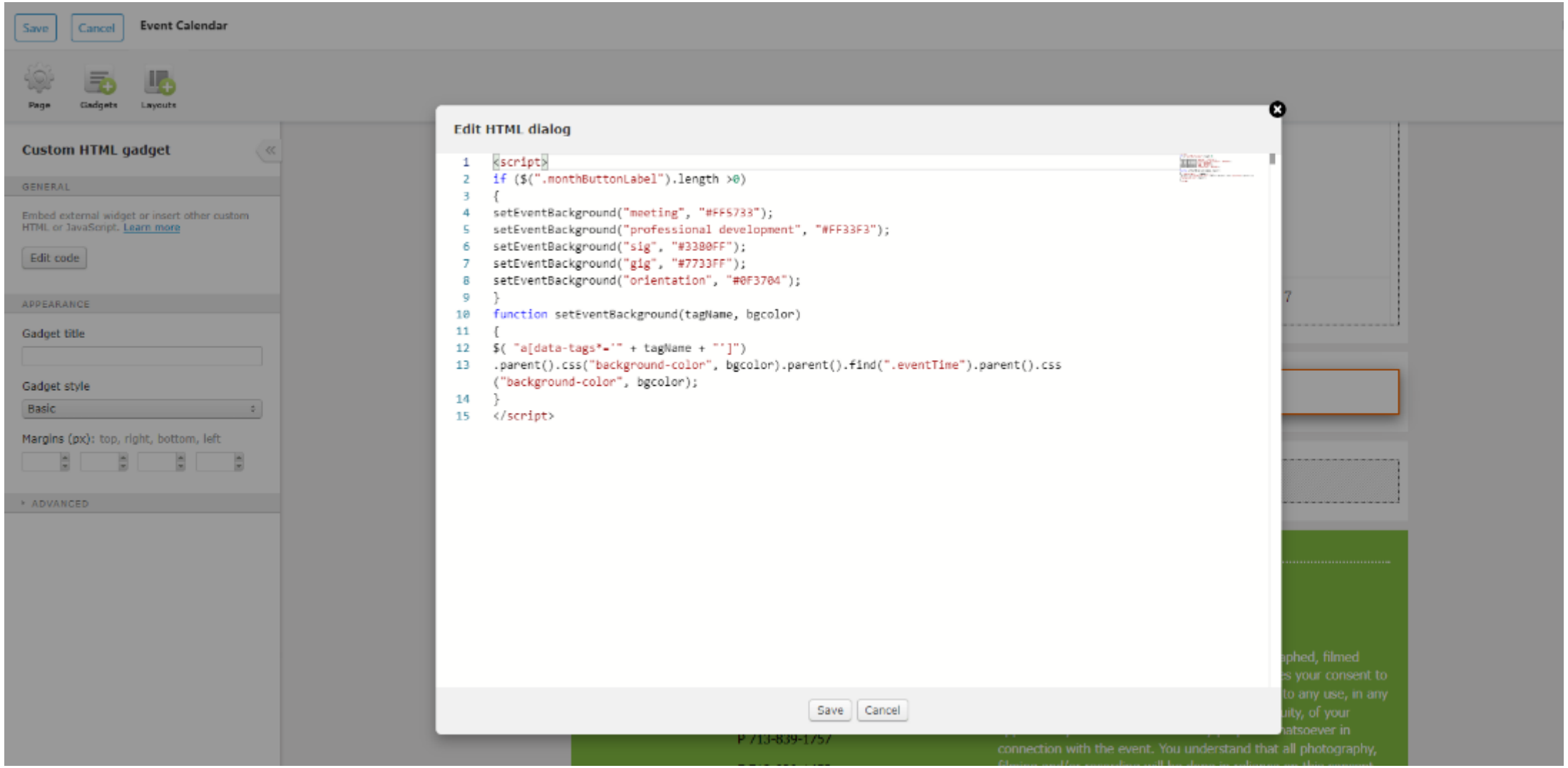

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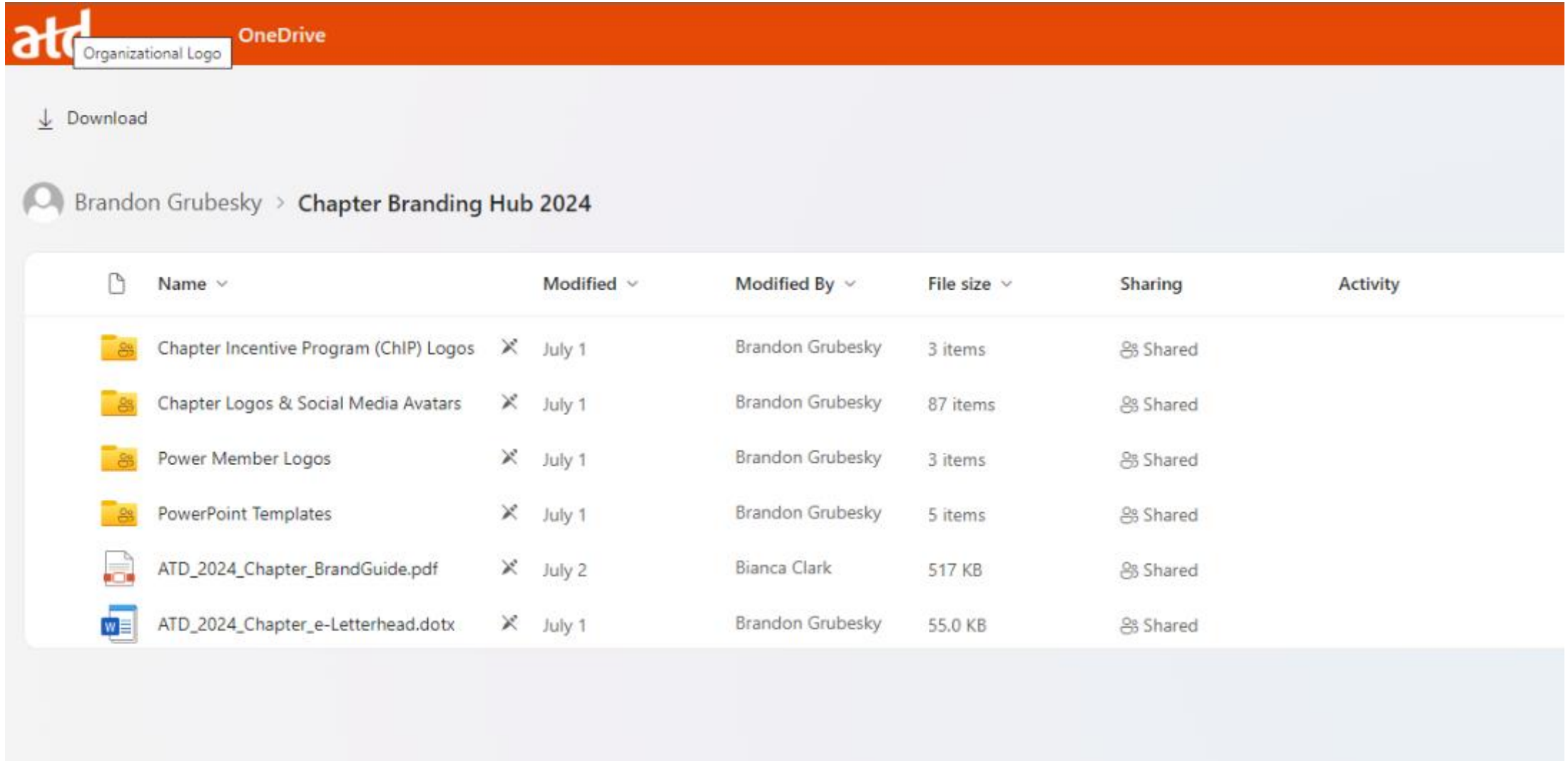
- During ATD's Annual Membership meeting, Tony Bingham announced that ATD is changing its logo colors—to blue and green.
- Updated materials will be available to chapters in July 2024.
- Chapters have one year, until May 15, 2025 to transition to the new brand. Find additional information below.



[branding portal.]

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ATD Primary Brand Colors

In logos, ATD Blue is used for all Chapter names and Steel is used for the words "Association for Talent Development." Additional accent colors can be used to complement brand colors for special cases such as chapter events or social campaigns.

Primary

AAA*

ATD Blue
CMYK 97/70/26/0
Hex: #005b8e
Use behind white text

Secondary

AAA

Steel
CMYK 86/77/66/0
Hex: #4a545f
Use behind white text

Accent

AAA

ATD Green
CMYK 53/3/99/0
Hex: #85bf42
Use behind black text

Hex: #005b8e
RGB: 0, 91, 142

Hex: #85bf42
RGB: 133, 191, 66

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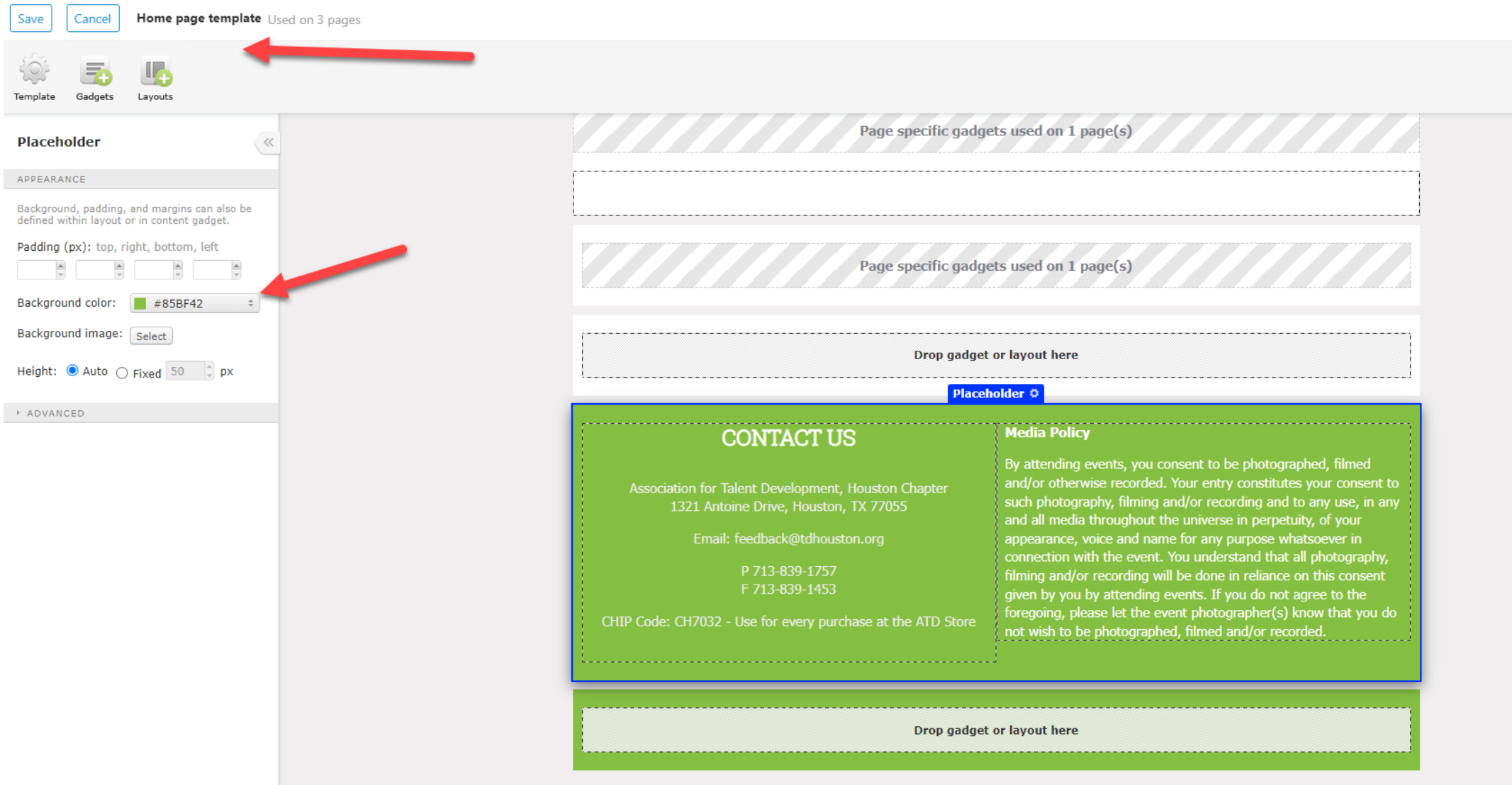

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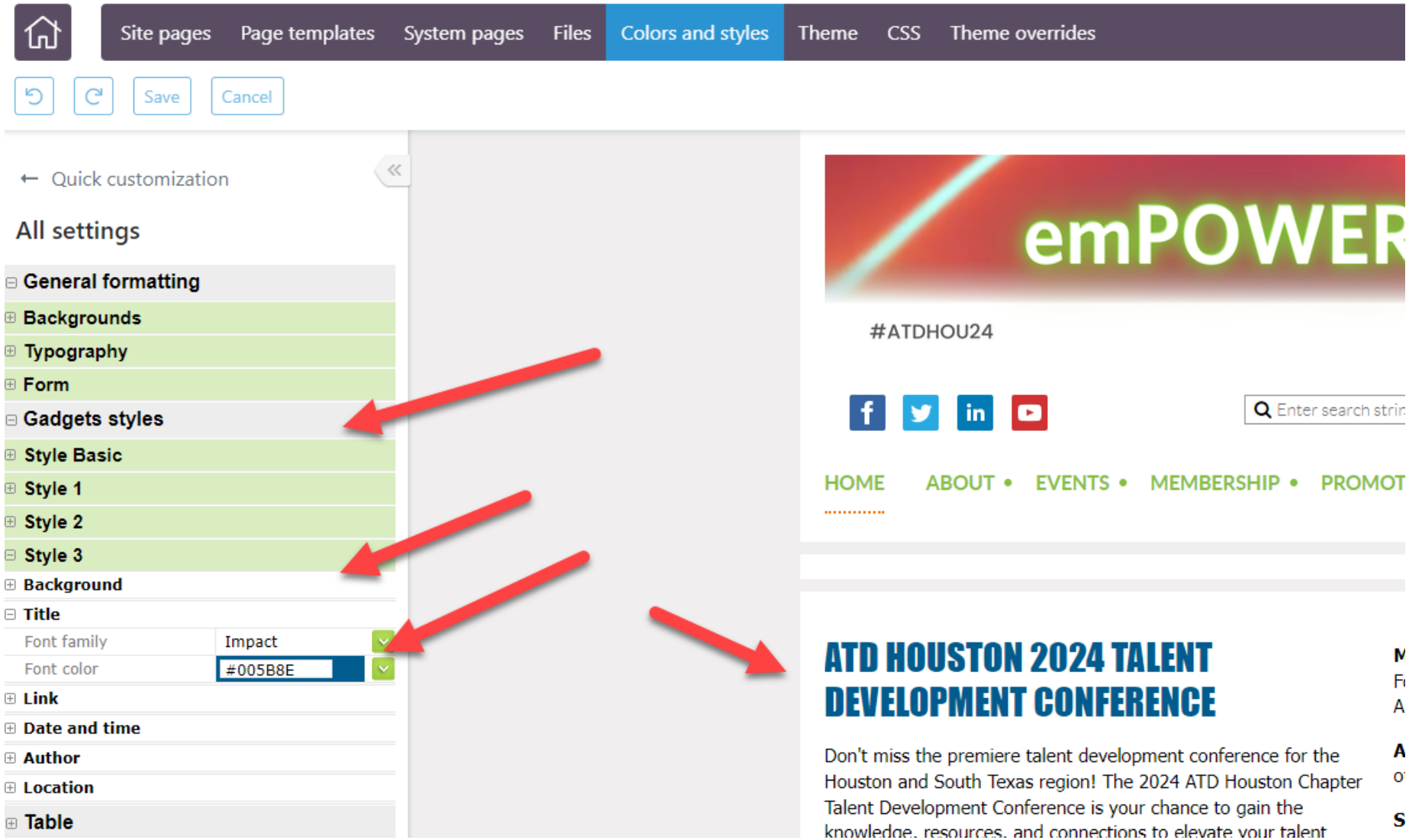

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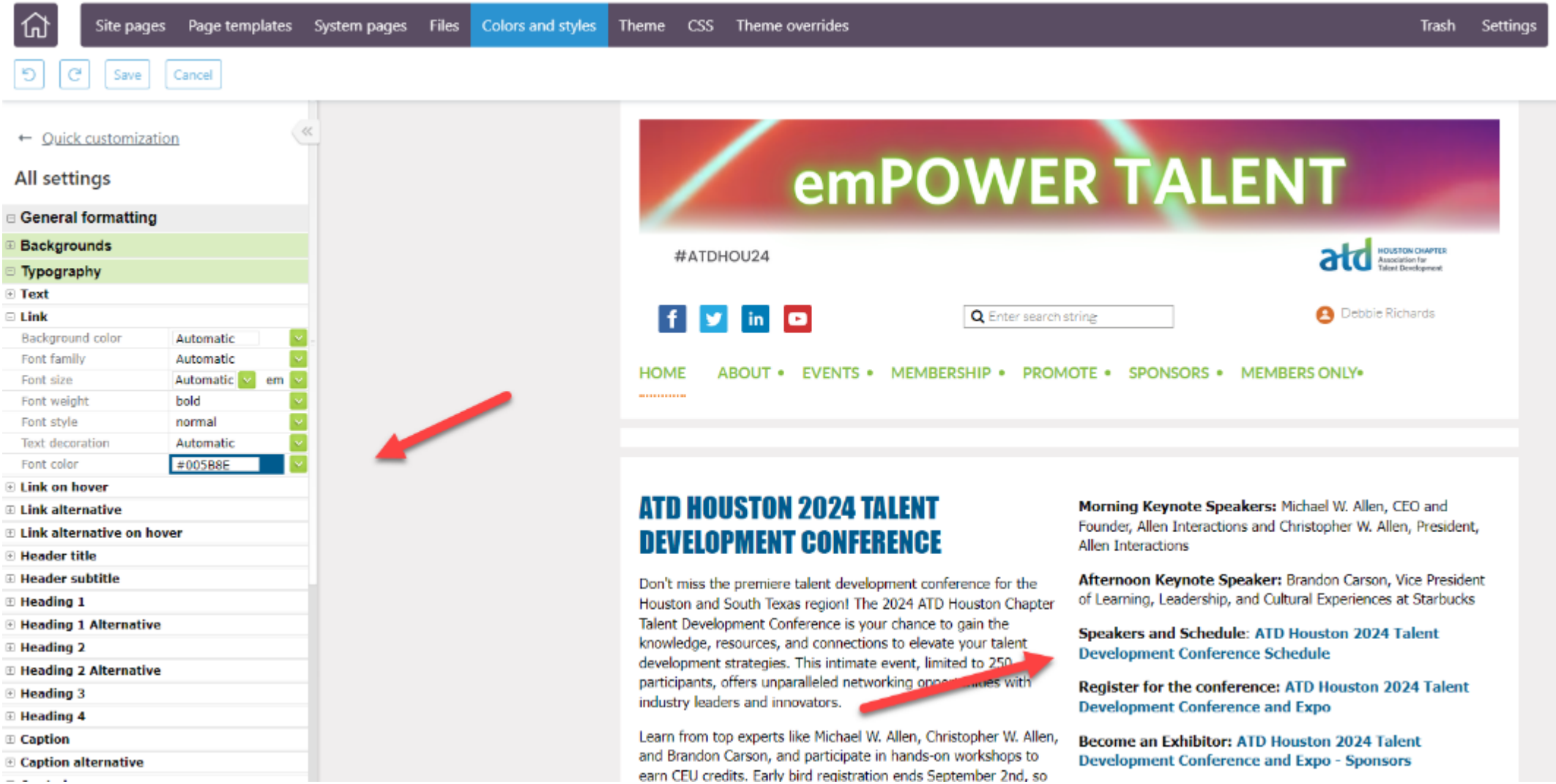

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ATD Houston 2024 Talent Development Conference and Expo

September 26, 2024, 8:00 AM – 5:00 PM @ West Houston Institute, 2811 Hayes Rd., Houston TX 77082

Visible to **Public**

Allow registration | Registration is enabled.

Event details | Registration form | Ticket types & settings | Emails | Registrants & Invitees | Waitlist & settings

* **Mandatory** fields

Basic information

Title ATD Houston 2024 Talent Development Conference and E

Event URL https://tdhouston.org/event-5731906

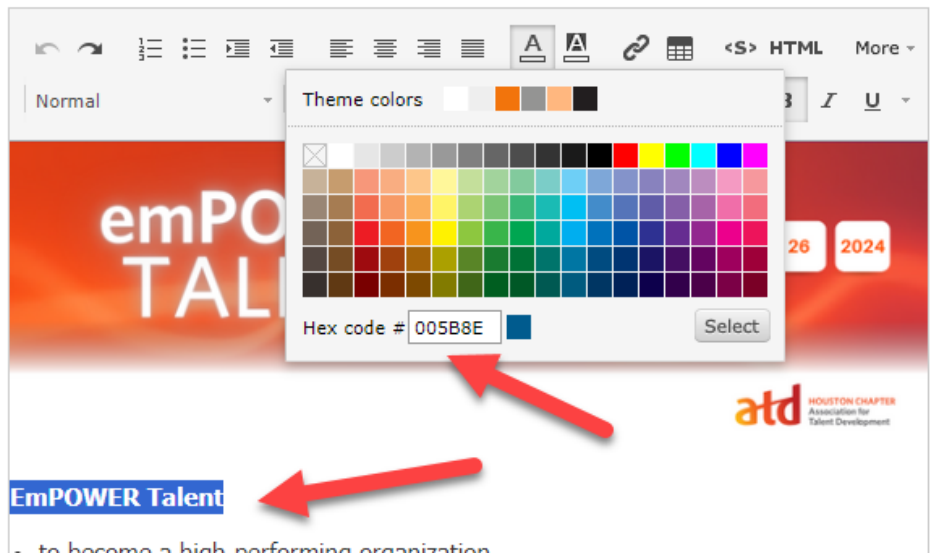
Copy and share this link. This is where potential attendees should register for event.

Tags conference, in person

Type or click on existing tag below. Separate with commas. You can use spaces within tags.

acmp , ai , board , capability model , career development , career transition , certificate , change management , classroom , coaching , coffee , communication , conference , consulting , cptd study group , ctn , data , developing professional capability , development , do not display , downtown , elearning , elw , elw2018 , employee learning week , energy corridor , evaluating learning impact , galleria , general meeting , gig , happy hour , hodn , icf , in person , instructional design , integrated talent management ,

Description



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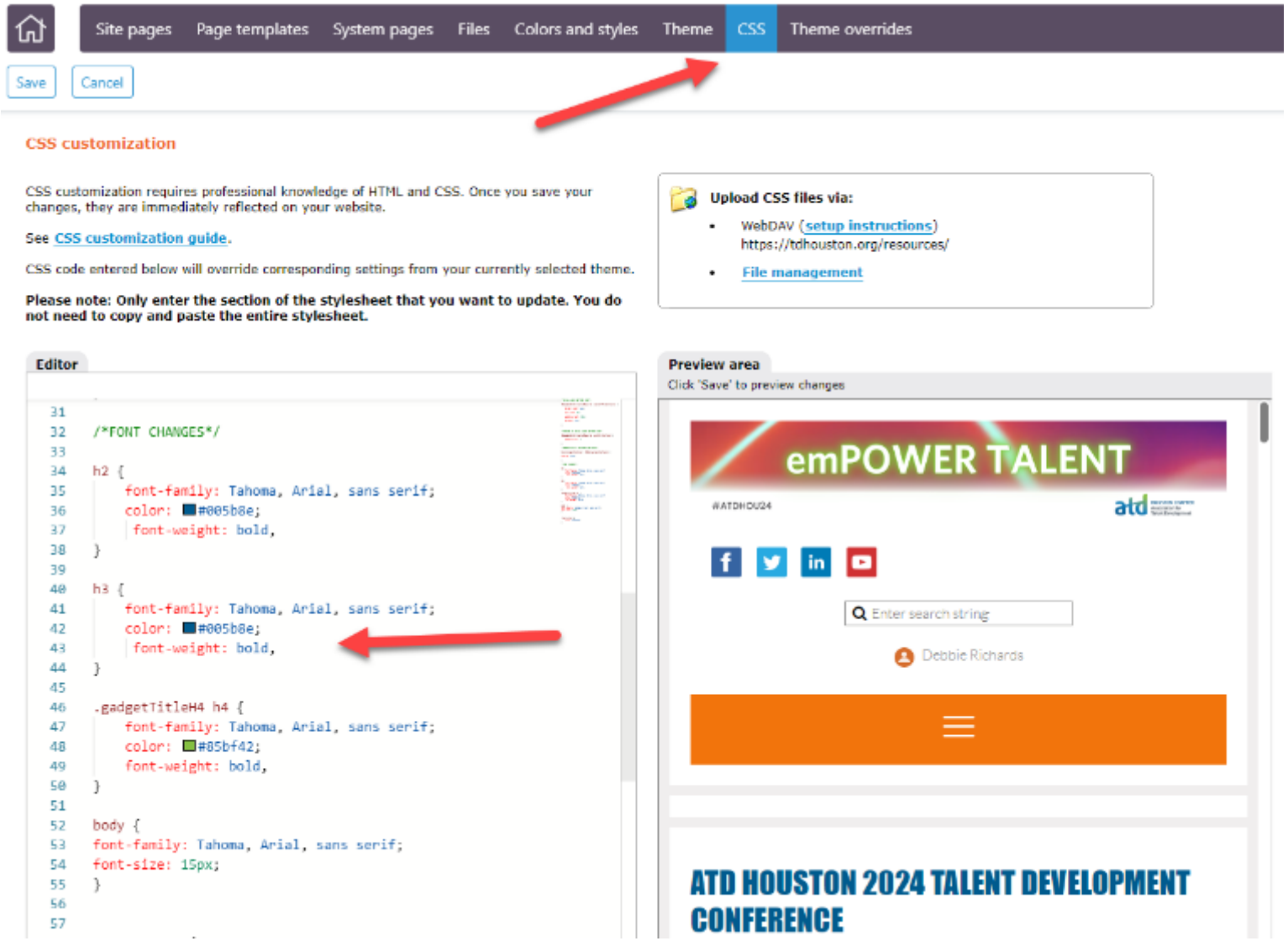

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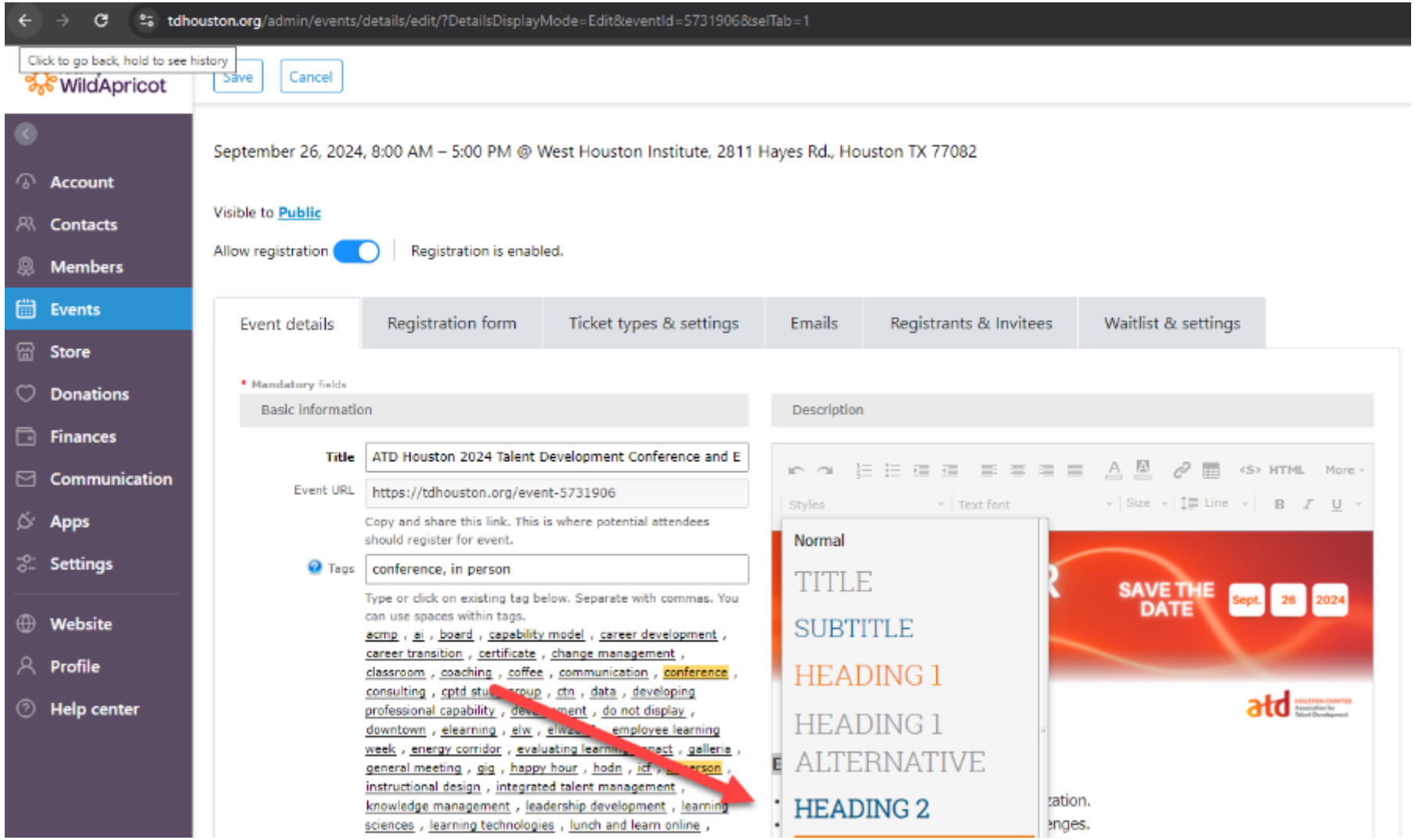

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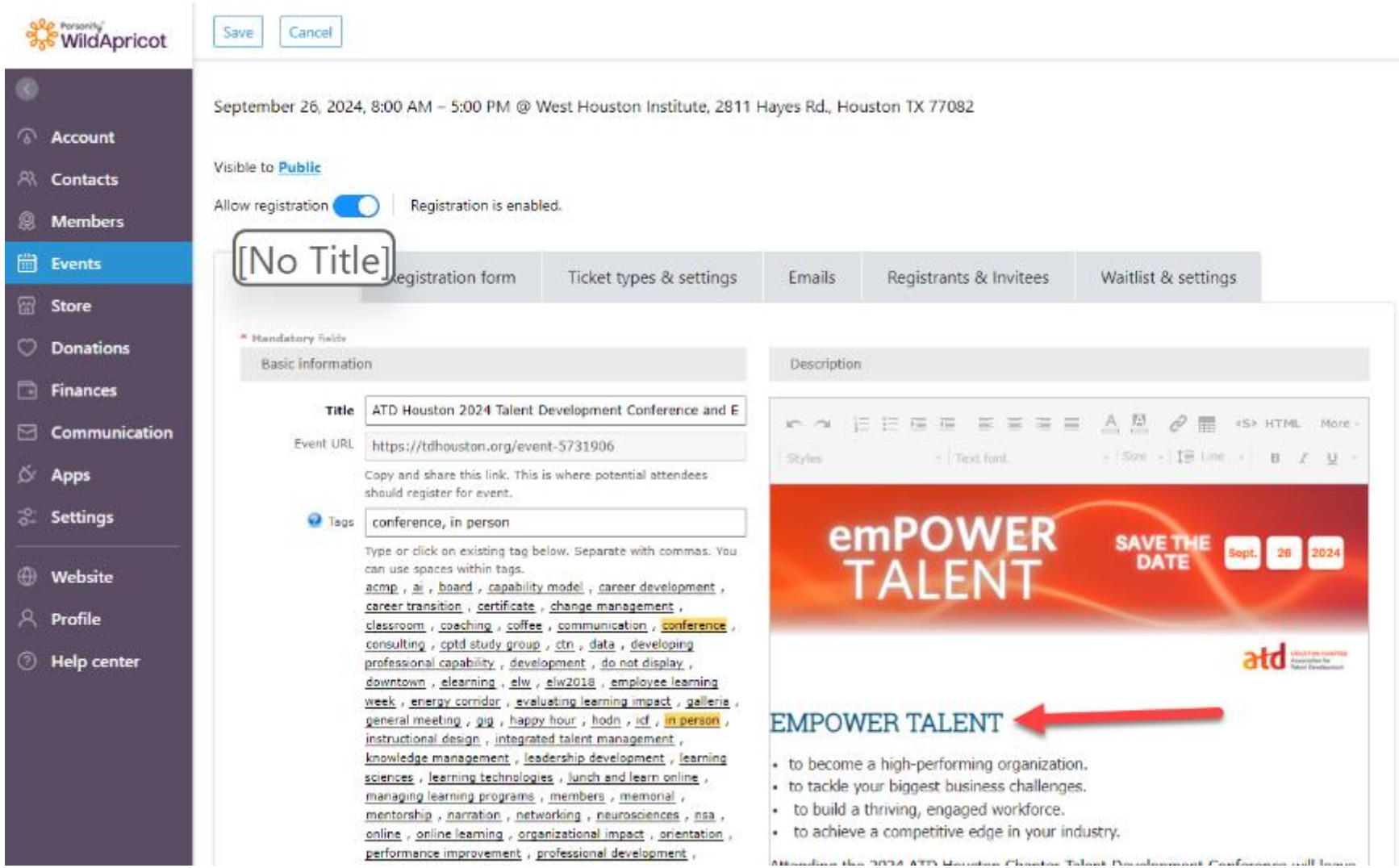

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