



CHICAGOLAND CHAPTER
Association for
Talent Development



Wild Apricot User Guide

HOW TO SETUP EVENTS IN WILD APIRCOT

Programming Team

ASSOCIATION FOR TALENT DEVELOPMENT | CHICAGOLAND CHAPTER



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Overview

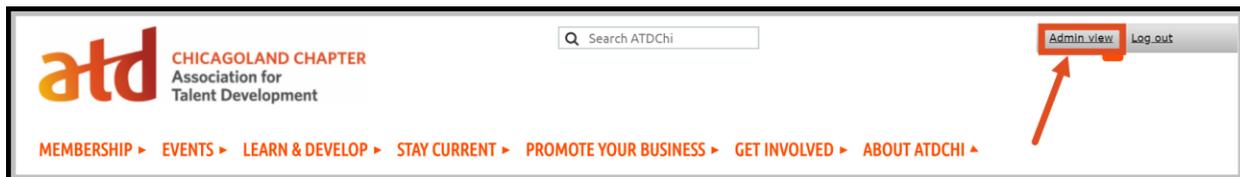
What is Wild Apricot? Wild Apricot is a web-based software that helps ATDChi manage memberships, the organization website, events and other activities.

What is the purpose of this guide? This guide provides instructions for how to **set up and manage events** in Wild Apricot. It does **not** go into deeper detail of the system, such as managing members or other topics.

Who should use this guide? The VP or Programming or other members of the Programming team will use this guide to set up and manage events.

When should this guide be used? Use this guide when building out ATDChi events and other activities at the start of the year. *Recommendation:* At the beginning of each year, build out a template for each of the event types listed below. Then, copy them as many times as necessary to create the “shells” for each event. This will enable you to leverage common elements required for set up and will save you time.

Where are events managed? The set up and management of events happens on the ATDChi website: <https://atdchi.org>. Board members with appropriate permissions will see an **Admin View** link upon logging into the website.



Before you begin, you should know: There are a few types of events/activities that will need to be set up each year. These include, but are not limited to:

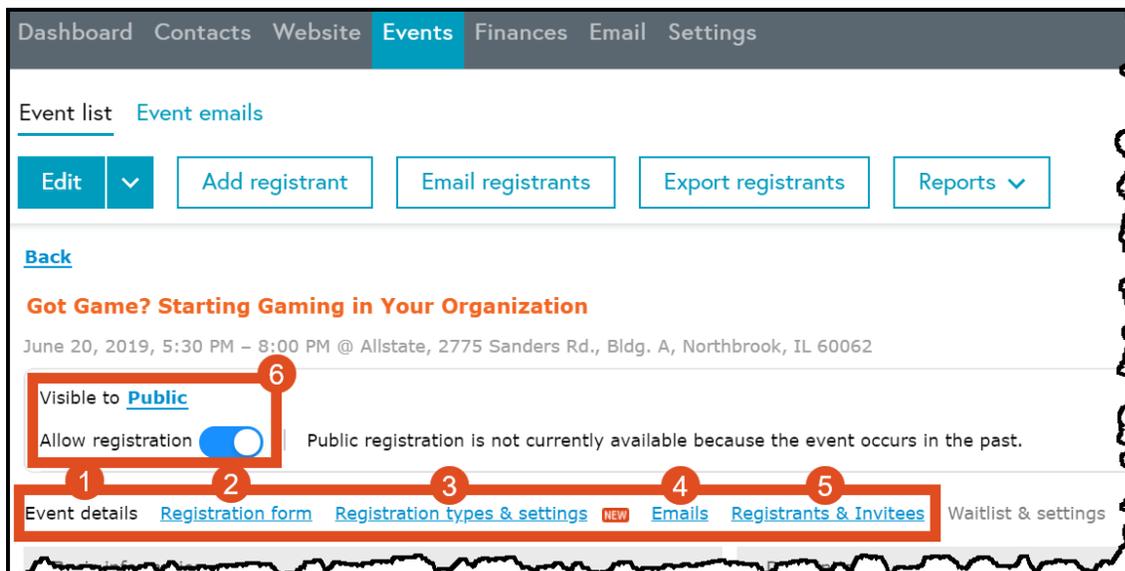
- Monthly Networking (live) events
- Monthly Webinar events
- PDN events
- Holiday Celebration
- Chicago eLearning & Technology Showcase (CETS)
- Other events deemed appropriate based on the goals of the current ATDChi President.

Each type of event listed above will require slightly different instructions for managing the type. It's *recommended* that you add all of the live networking events to Wild Apricot before adding the other event types. This is because the instructions below are more detailed for the networking events.

PART 1: EVENTS

Setting Up Events (Live Networking, Webinars, and PDNs)

You will be able to edit the event details and settings for each event added to Wild Apricot. There are **six** groups of settings this guide will focus on.



Dashboard Contacts Website **Events** Finances Email Settings

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Got Game? Starting Gaming in Your Organization

June 20, 2019, 5:30 PM – 8:00 PM @ Allstate, 2775 Sanders Rd., Bldg. A, Northbrook, IL 60062

Visible to [Public](#)

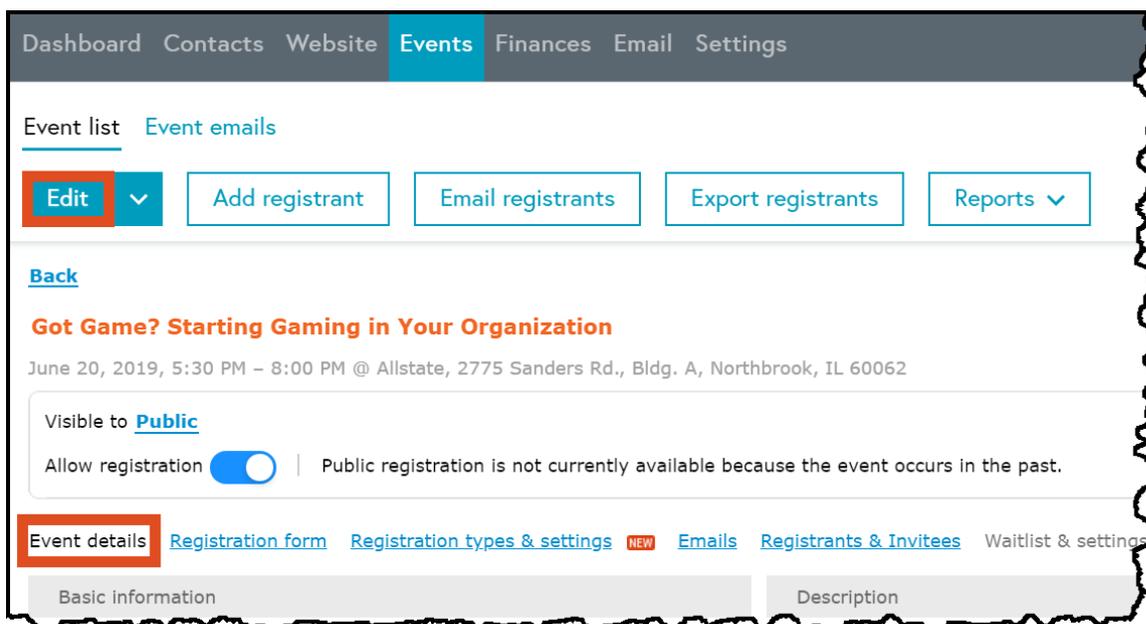
Allow registration Public registration is not currently available because the event occurs in the past.

[Event details](#) [Registration form](#) [Registration types & settings](#) [Emails](#) [Registrants & Invitees](#) [Waitlist & settings](#)

1 2 3 4 5 6

1. EVENT DETAILS

Let's start with the **Event Details** section. Within the event you want to set up or edit, click on the **Event Details** link (if not already there) and then click the **Edit** button.



Dashboard Contacts Website **Events** Finances Email Settings

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Allow registration Public registration is not currently available because the event occurs in the past.

[Event details](#) [Registration form](#) [Registration types & settings](#) [Emails](#) [Registrants & Invitees](#) [Waitlist & settings](#)

Basic information Description

Edit the following information:

- **Basic Information**

- Title** – Use the exact title of the event.
- URL** – This is automatically generated when you copy or create a new event.
- Tags** – Use the appropriate tag, based on the type of event. See table.

Live Networking Events	Webinars	PDNs
<i>networking</i>	<i>webinar</i>	<i>coaching-pdn</i> <i>corp_u_pdn</i> <i>odn</i> <i>pdn</i>

* **Mandatory fields**

Basic information

Title **a**

Event URL **b**

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

Tags **c**

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

[advertising](#) , [atd event](#) , [board event](#) , [book club](#) , [clinic](#) , [coaching-pdn](#) , [conference](#) , [corp_u_pdn](#) , [cplp](#) , [dinner](#) , [job](#) , [member-discount](#) , [members-only](#) , [mentor request](#) , [mentor_offer](#) , [mentoring](#) , [networking](#) , [new member orientation](#) , [odn](#) , [pdn](#) , [post_job](#) , [regional](#) , [regular](#) , [rfp](#) , [sewi-atd](#) , [sponsor-event](#) , [sponsorship](#) , [webinar](#) , [wipi](#) , [workshop](#)

- **When and where**

- a. **Location** – Type the appropriate information, based on the type of event. See table.

Live Networking & PDN Events	Webinars
Add the university or business name and the exact address, as well as any building numbers that might be helpful.	Webinar

- b. **Time zone** – Use the default (UTC-06:00 – Central Time)

- c. **Start date & Time** – Add the date of the event and the time the event starts.

- d. **End date & Time** - Add the date of the event and the time the event ends.

When and where

a Location

b Time zone Use default organization settings
(UTC-06:00) Central Time (US & Canada)

c **Start date** Time

d **End date** End time

- **List of event registrants**

- Use these settings:

List of event registrants

Show registrants who want to be listed

- to everyone
- to members only

Include pending registrations

- **Guest registration**

- Use this setting:

Guest registration

- Do not add new guests to contacts list
- Add new guests to contacts list only if email entered
- Add all new guests to contacts list



- **Description** – Copy and paste the event description into the open text field with the following information, based on the type of event :

Live Networking Events	Webinars	PDNs
<ul style="list-style-type: none"> • Description of Event • Light buffet dinner will be served • Agenda • Fee Schedule (this should align with the registration types and settings area) • Presenter Pic & Bio • Sponsor Info • Cancellation Policy 	<ul style="list-style-type: none"> • Description of Event • Fee Schedule (this should align with the registration types and settings area) • Presenter Info • Sponsor Info • Cancellation Policy 	<ul style="list-style-type: none"> • Description of Event • Location, Time, Agenda • Registration Details (incl. Fees if appropriate) • Presenter Info

<p>!</p>	<p>Make sure not to copy and paste directly from Word into the web editor as it will pull in unwanted HTML code, which will cause serious formatting issues.</p> <p>To avoid formatting issues when copying and pasting, follow one of these options.</p> <ul style="list-style-type: none"> • Copy the description into note pad or text file and then copy that version and paste into the description...OR • Use CTRL + Shift + V – This will automatically clear all HTML formatting.
-----------------	--

- When you've completed the **Event Details** section, click **Save** and move onto the **Registration Form** section.

2. REGISTRATION FORM

1. For Live Networking and Webinar Events only, click the **Registration Form** link. (*PDN events do not have a registration form.*)
2. Ensure these fields are selected:

[Event details](#) [Registration form](#) [Registration types & settings](#) NEW [Emails](#) [Registrants & Invitees](#) [Waitlist & settings](#)

Common fields
Choose the common fields to include in the event registration form.

- All common fields
 - First name A *
 - Middle name A
 - Last name A *
 - Suffix A
 - Member Credentials (e.g. CPLP, SPHR, etc.) A
 - Nickname A
 - e-Mail ✉ *
 - Phone A *
 - Alternate e-Mail Address A
- ORGANIZATION INFORMATION
 - Organization A *
 - Title A *
- MAILING ADDRESS
 - Primary Address Line 1 A *
 - Primary Address Line 2 A
 - Primary City A *
 - Primary State 📍 *
 - Primary Zip A *
 - Is your Primary Address for Work or Home? 🏠
- OTHER INFORMATION
 - How did you hear about us? 📄

Custom fields
Customize the event-specific fields to be displayed below common fields in the form.

- [Photo/Video Consent](#) ✅ *
- [List any Dietary Needs you may have](#) 📄

3. When you've completed the **Registration Form** section, click **Save** and move onto the **Registration Types & Settings** section.

3. REGISTRATION TYPES & SETTINGS

To update the registration types and settings, click **Registration Types & Settings** and then click Edit. *(Note: this is for Live Networking & Webinar Events only. PDN Events do not have this link.)*

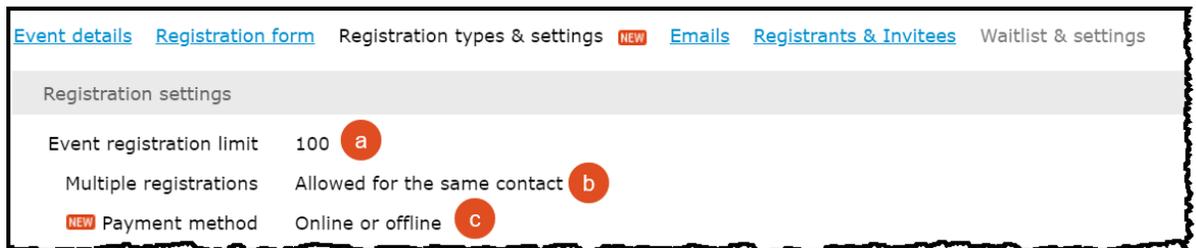
1. Registration Settings:

- a. **Event Registration Limit** – Set the event registration limit based on the information in the table.

Live Networking Events	Webinars
100 *Unless the venue has more limited or greater capacity.	95

- b. **Multiple registrants** – Set to **Allowed for the same contact**.
- c. **Payment method** – Set to **Online or Offline**.

***NOTE:** This option may change to “online” only. Check with the current President.*





2. **Registration Types** - Add the registration types, based on the information in the table:

Live Networking Events <i>* Notice that each type has an early bird rate and a regular (aka late registration) rate.</i>	Webinars
<ul style="list-style-type: none"> • Board Member & Special Guest Early Bird • Board Member & Special Guest <hr/> • Member Early Bird • Member <hr/> • Non-member Early Bird • Non-member <hr/> • Student Member Early Bird • Student Member 	<ul style="list-style-type: none"> • Member • Non-member

To add a registration type, click **Add type**.

Registration types			
Type name	Price (USD)	Availability	Guest registrations
Board Member & Special Guests Early-Bird	25.00	Registration code required + from May 09, 2019 through June 02, 2019 (18 days before start of event)	
Board Members & Special Guests	30.00	Registration code required + from June 03, 2019 through June 17, 2019 (3 days before start of event)	
Member Early-Bird	30.00	Limited access + from May 09, 2019 through June 02, 2019 (18 days before start of event)	
Members	45.00	Limited access + from June 03, 2019 through June 17, 2019 (3 days before start of event)	
Non-Member	60.00	Public access + from June 03, 2019 through June 17, 2019 (3 days before start of event)	
Non-Member Early-Bird	45.00	Public access + from May 09, 2019 through June 02, 2019 (18 days before start of event)	
Student Member	40.00	Limited access + from June 03, 2019 through June 17, 2019 (3 days before start of event)	
Student Member Early-Bird	25.00	Limited access + from May 09, 2019 through June 02, 2019 (18 days before start of event)	
<input type="button" value="Add type"/>			



For each registration type, enter the following information.

- a. **Status:** Make sure this is set to **Enabled**.
- b. **Name:** Enter in the **name** of the registration type.
- c. **Base Price:** Enter in the **price** for the registration type. The fee schedule for each registration types can vary from event to event. *Check with current President.*
- d. **Sold/Limit:** Do not set a **limit**.
- e. **Multiple Registrants:** Set to **Allowed for the same contact**.
- f. **Cancellation:** Set to **Do not allow cancellation by registrants**.
- g. **Guests:** Set to **Not allowed**.
- h. **Availability:** A registration code is required for the Board Member & Special Guests type. Use: "Board" followed by the year. (e.g.: **Board2019**)
- i. **Available period:**

Live Networking Events	Webinars
<ul style="list-style-type: none"> • For Early Bird: The start date should be the day registration opens (6 weeks prior to the event). The end date should be roughly 2 weeks before the event. • For Regular: The start date should be the next day after the early bird end date. The end date should be the date that no more registrations will be accepted (typically 3 days before the event itself). 	<p>The start date should be the day registration opens (6 weeks prior to the event).</p> <p>The end date should be the date that no more registrations will be accepted (typically 3 days before the event itself).</p>

- j. **Display options:** Select *Hide if unavailable*.

Event registration type for Got Game? Starting Gaming in Your Organization

June 20, 2019, 5:30 PM – 8:00 PM @ Allstate, 2775 Sanders Rd., Bldg. A, Northbrook, IL 60062

Registration type details

Status: Enabled **a**

Name: Board Member & Special Guests Early-Bird **b**

Description:

Base price: \$25.00 (USD) **c**

Taxes: Disabled

Registration type settings

Sold/Limit: 15 (limit not set) **d**

Multiple registrations: Allowed for the same contact **e**

Cancellation: Do not allow cancellation by registrants **f**

Guest registration

Guests: Not allowed **g**

Registration type availability

Availability: Registration code required (Board2019) **h**

Available period: From May 09, 2019 through June 02, 2019 (18 days before start of event) **i**

Display options: Hide if unavailable **j**



- k. Click **Save**. When you've completed the **Registration Types & Settings** section, move onto the **Emails** section.

4. EMAILS

Emails are used for Live Networking & Webinar Events only. Do not set up emails for PDN events.

Emails are delivered for a few purposes: 1) To announce an event and to encourage people to register. 2) To remind participants of an event for which they have registered. 3) To inform participants when they are confirmed for the event, if their registration is pending, when their registration has been cancelled, or when people are put on a waitlist.

- **Event Organizer:** This person will receive a copy of all confirmation emails that are sent when participants register. This can be the VP of Programming or the Manager of Events.
 - a. Click the **Edit** button to edit the organizers name.
 - b. Click the **Change** link and select the board member's name.

Event organizer
(used as reply-to for announcements and reminders; receives copies of all event emails)

Organization contact
admin@atdchi.org

Claerhout, Deanna [Change..](#) **b**
dclerhout.atdchi@gmail.com

Copy emails according to email routing settings [?](#)

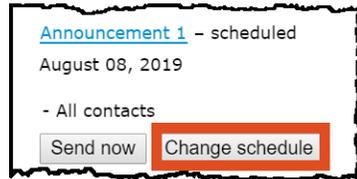
- **Announcements:** There are three announcements that should be scheduled to announce and promote ATDChi events.

Announcement Key

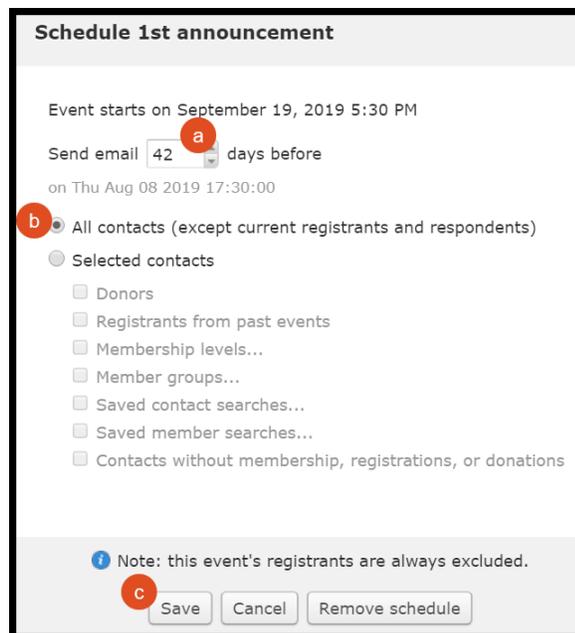
- **Announcement 1:** Scheduled 6 weeks (42 days) before the event.
- **Announcement 2:** Scheduled 3 weeks (21 days) before the event.
- **Announcement 3:** Scheduled 1 week (7 days) before the event.

To set the announcement:

1. Click the **Change schedule** button next to *each* announcement. Follow the steps below for announcements 1, 2, and 3.



2. A pop-up window will display.
 - a. Change the **number of days before event** (using the *announcement key* above).
 - b. Select **All Contacts**.
 - c. Click **Save**.



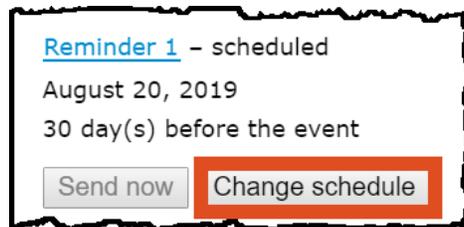
!	<p>Each of these announcement are pulled from the Event emails area of Wild Apricot.</p> <ul style="list-style-type: none"> • Use these templates as a starting point. Then edit the email as needed to provide specific details that are necessary for the event you're creating. For example, you may want to provide specific parking information, which would not pertain to all events. • Click the corresponding Announcement link to modify the announcement, if necessary, for the event you're creating. Only use this option if the message must be different from the template.
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- **Reminders:** Reminder emails are sent to participants who are registered for the event. There are three reminders that should be scheduled.

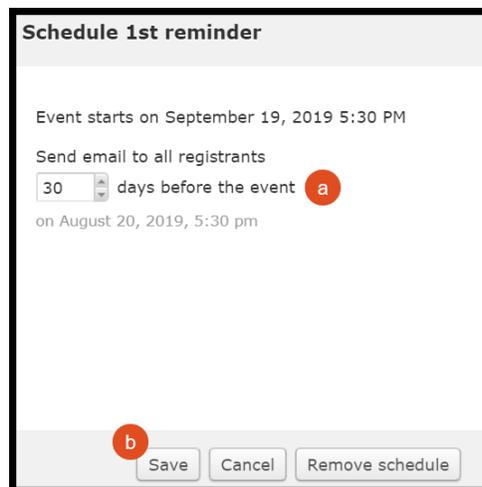
Reminder Key

- **Reminder 1:** Scheduled one month (30 days) before the event.
- **Reminder 2:** Scheduled two weeks (14 days) before the event.
- **Reminder 3:** Scheduled two days before the event. (See note below for special handling for Webinars)

3. Click the **Change schedule** button next to *each* reminder. Follow the steps below for reminders 1, 2, and 3.



4. A pop-up window will display.
 - a. Change the **number of days before event** (using the *reminder key* above).
 - b. Click **Save**.



!

Each of these reminders are pulled from the **Event emails** area of Wild Apricot.

- Use these templates as a starting point. Then edit the email as needed to provide specific details that are necessary for the event you're creating. For example, you may want to provide specific parking information, which would not pertain to all events.
- Click the corresponding **reminder** link to modify the reminder, if necessary, for the event you're creating. Only use this option if the message must be different from the template.

	<p>SPECIAL HANDLING FOR WEBINARS:</p> <ul style="list-style-type: none"> • Edit Reminder 3. Make sure to include the webinar information (e.g.: webinar link, dial in instructions, etc.)
--	--

- **Registration Emails:** There are four registration emails for each event:
 1. **Event registration confirmed:** Sent to registrant and event organizer after registration was paid or confirmed by administrator. (See note below for special handling for Webinars).
 2. **Event registration pending:** Sent to registrant and event organizer after registration was submitted and payment is still required.
 3. **Event registration canceled:** Sent when registration is canceled by the registrant, by an admin, or automatically.
 4. **New waitlist registration:** Sent when new waitlist registration is confirmed.

Registration emails

[Event registration confirmed](#)
Sent after registration was paid or confirmed by administrator

- Send to registrant
- Send copy to organizer

[Event registration pending](#)
Sent after registration was submitted and payment is required

- Send to registrant
- Send copy to organizer

[Event registration canceled](#) – not set
Sent when registration is canceled by the registrant, by an admin, or automatically

[New waitlist registration](#) – not set
Sent when new waitlist registration is confirmed

!	<p>Each of these registration emails are pulled from the Event emails area of Wild Apricot.</p> <ul style="list-style-type: none"> • Use these templates as a starting point. Then edit the email as needed to provide specific details that are necessary for the event
---	--

you're creating. For example, you may want to provide specific parking information, which would not pertain to all events.

- Click the corresponding **registration email** link to modify the reminder, if necessary, for the event you're creating. Only use this option if the message must be different from the template.

SPECIAL HANDLING FOR WEBINARS:

- Edit the **Email Registration Confirmed** message. Make sure to include the webinar information (e.g.: webinar link, dial in instructions, etc.)

5. REGISTRANTS & INVITEES

There is nothing to set in this area, but as people register, this is where you will find the list of attendees.

Example:

Check in	Registrant Name, Email, Organization	Membership Status, Renewal due, Level	Registration Type, Amount, Date, Invoice	Payment status
✓	Bank, Robert US Foods rob19d@hotmail.com	Active member 22 Feb 2020 1a) Regular Member	Member Early-Bird - \$30.00 9 May 2019, 6:00 PM Invoice #03926	Paid
✓	Craig, Daniel Independent Consultant dan@craigcraig.com	Active member 5 Mar 2020 1a) Regular Member	Member Early-Bird - \$30.00 9 May 2019, 6:19 PM Invoice #03927	Paid
✓	Tarrell, Eileen CARA etarrell@gmail.com	Active member 27 Dec 2019 4) Sponsor Member - Gold	Board Member & Special Guests Ea 9 May 2019, 9:02 PM Invoice #03930	Paid
✓	Bernard, Pamela College of American Pathologists pbernard@cap.org	Active member 22 Feb 2020 1a) Regular Member	Member Early-Bird - \$30.00 10 May 2019, 5:10 PM Invoice #03934	Paid
✓	Kigoby, Colleen Merckle colleen.kigoby@merckle.com	Active member 5 Oct 2019 1a) Regular Member	Member Early-Bird - \$30.00 13 May 2019, 9:58 AM Invoice #03941	Paid



6. MAKING THE EVENT VISIBLE & ALLOWING REGISTRATION

After you've completed all of the above, your event is ready to be posted on the website. To do so:

- Click the **Visible to (link)** and change it to **Public**.
- If you want to **allow registration**, clicking the toggle switch. See table below.

Live Networking Events	Webinars	PDN Events
Make Visible to Public	Make Visible to Public	Make Visible to Public
Allow registration	Allow registration	DO NOT Allow registration <i>(This is because registration for these events is handled outside of the system.)</i>

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Edit ▼
Add registrant
Email registrants
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Reports ▼

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Got Game? Starting Gaming in Your Organization

June 20, 2019, 5:30 PM – 8:00 PM @ Allstate, 2775 Sanders Rd., Bldg. A, Northbrook, IL 60062

Visible to [Public](#)

Allow registration Public registration is not currently available because the event occurs in the past.



CETS

Registration for the Chicago eLearning & Technology Showcase (CETS) occurs via the CETS website: <http://chicagoelearningshowcase.com/>. However, as a partner of the annual CETS event, ATDChi advertises the event to our members via our website.

Setting up the event in Wild Apricot is similar to setting up an ATDChi event, with a few nuances:

Details

CETS will provide the event details, including the location, date, time and description. Enter all the information as you would a typical ATDChi event, EXCEPT:

- **Do not allow registration.** Registration occurs via the CETS website.

Registration Form

Since registration is disabled on the ATDChi website (because it occurs via the CETS website), you don't have to do anything to the standard form.

Registration Types & Settings

Since registration is disabled on the ATDChi website (because it occurs via the CETS website), you don't have to do anything to this area.

Emails

The **Event Organizer** should be set to admin@atdchi.org

CETS will provide ATDChi with the **Announcement** messages and dates to send them. Update the three announcements as you would a typical ATDChi event, using the content CETS has provided.

Note: There will be no Reminder messages or Registration Emails sent via Wild Apricot.

Registrants & Invitees

Since registration is disabled on the ATDChi website (because it occurs via the CETS website), you don't have to do anything to this area.

Annual Holiday Event & Volunteer Recognition Party

Refer to the **Setting up Events** section of this document and set up the event according to networking event type.

Be sure to eliminate the Presenter information and add language about the food and beverages that will be served (e.g.: hors d'oeuvres or dinner).

Employee Learning Week

Refer to the **Setting up Events** section of this document and set up the event according to the event type (networking or webinar).

Consider adding an image and the language below to the beginning of the description:



ATD's Employee Learning Week (ELW) is an opportunity for companies to demonstrate their commitment to talent development. As your local chapter we are offering a series of webinars to support your learning efforts. We've partnered with some of the best in their field to share their areas of expertise.

MONDAY TOPIC

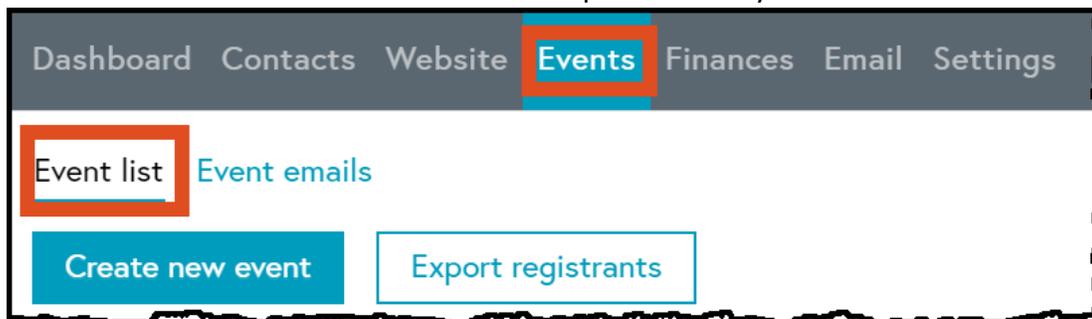
PART 2: OTHER EVENT TASKS

Printing Attendance List

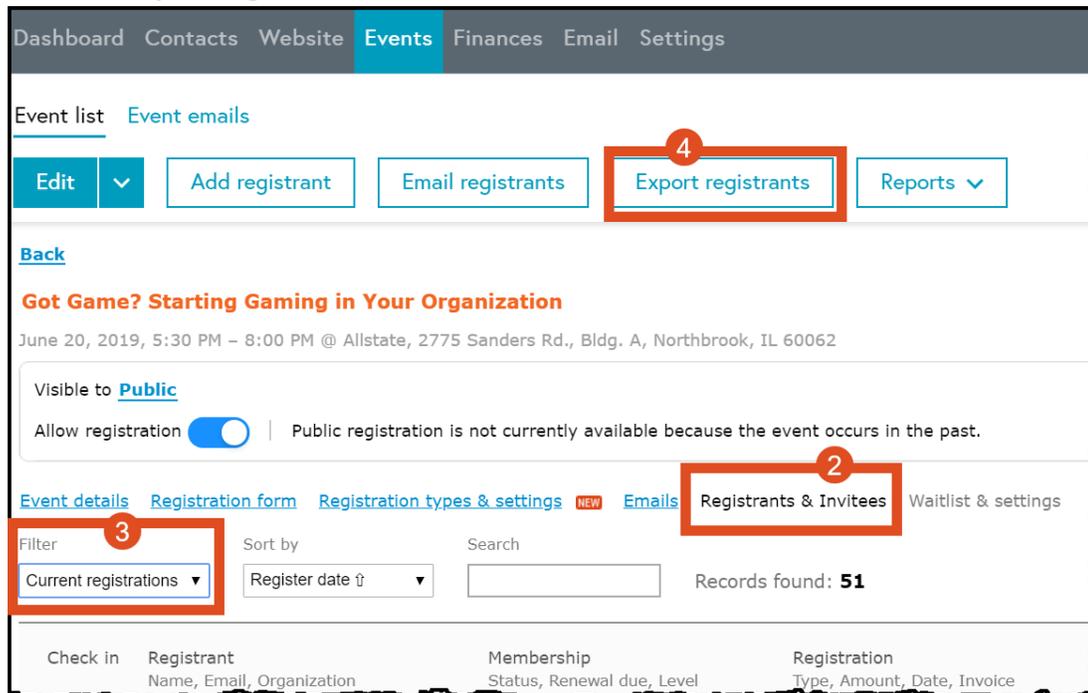
For live networking events, **two copies** of the event attendance list should be printed as close to the event as possible (ideally the day of the event or the evening before). The two paper versions of the list will be used to check event participants in.

To print the attendance list:

1. Go to the Event List and find and select the specific event you want the list for.



2. Then, click the **Registrants & Invitees** link.
3. Filter the list by **Current registrants**.
4. Click the **Export registrants** button.



Dashboard Contacts Website **Events** Finances Email Settings

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Got Game? Starting Gaming in Your Organization

June 20, 2019, 5:30 PM – 8:00 PM @ Allstate, 2775 Sanders Rd., Bldg. A, Northbrook, IL 60062

Visible to **Public**

Allow registration | Public registration is not currently available because the event occurs in the past.

[Event details](#) [Registration form](#) [Registration types & settings](#) NEW [Emails](#) [2](#) Registrants & Invitees [Waitlist & settings](#)

Filter [3](#) [1](#) Sort by Search

[Current registrations](#) [Register date](#) Records found: **51**

Check in	Registrant Name, Email, Organization	Membership Status, Renewal due, Level	Registration Type, Amount, Date, Invoice
----------	---	--	---

5. In the pop-up window that appears, select **Export to XLS**.
6. **Check these boxes**, which indicates which fields will appear on the list:
 - First name
 - Last name
 - Member credentials
 - Organization
 - Title
 - Photo/Video Consent
 - List any dietary needs...
 - Payment state
7. Finally, click the **Export** button. Your XLS file will automatically be downloaded on your machine.

Export registrants

Export to: XLS (Excel 2003+) 5

Export all fields

Event

Event ID
 Event title
 Start date
 End date
 Event location
 Event tags
[Select all](#) / [Clear all](#)

Registration form

User ID
 First name
 Middle name
 Last name
 Suffix
 Member Credentials (e.g. CPLP, PHR, etc.)
 Nickname
 e-Mail
 Phone
 Alternate e-Mail Address
 Organization
 Title

7 Export Cancel

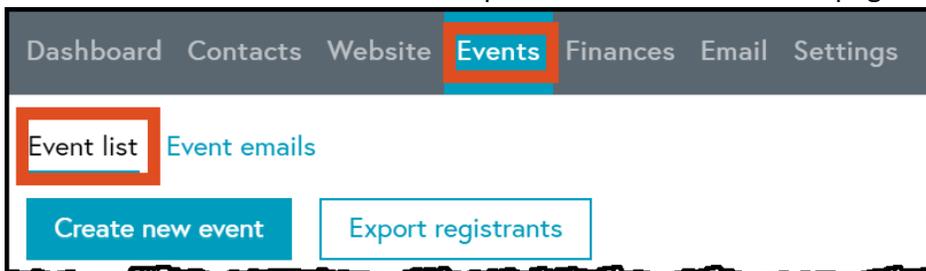
8. **Open** the file.
9. Modify the **width of the cells to make them narrower** (this will allow all of the information to be printed on the same page). You may also want to **wrap the text** in certain columns.
10. **Select the area** of the file that you want to print (click and drag until all of the cells you want to print are highlighted).
11. Click **Print**.
12. Change the number of copies to **2**.
13. Change the portrait orientation to **Landscape**.
14. Ensure that the file will print on **one side** of the paper.
15. Click **Print**.

Sending the “Thank you for attending...” Email

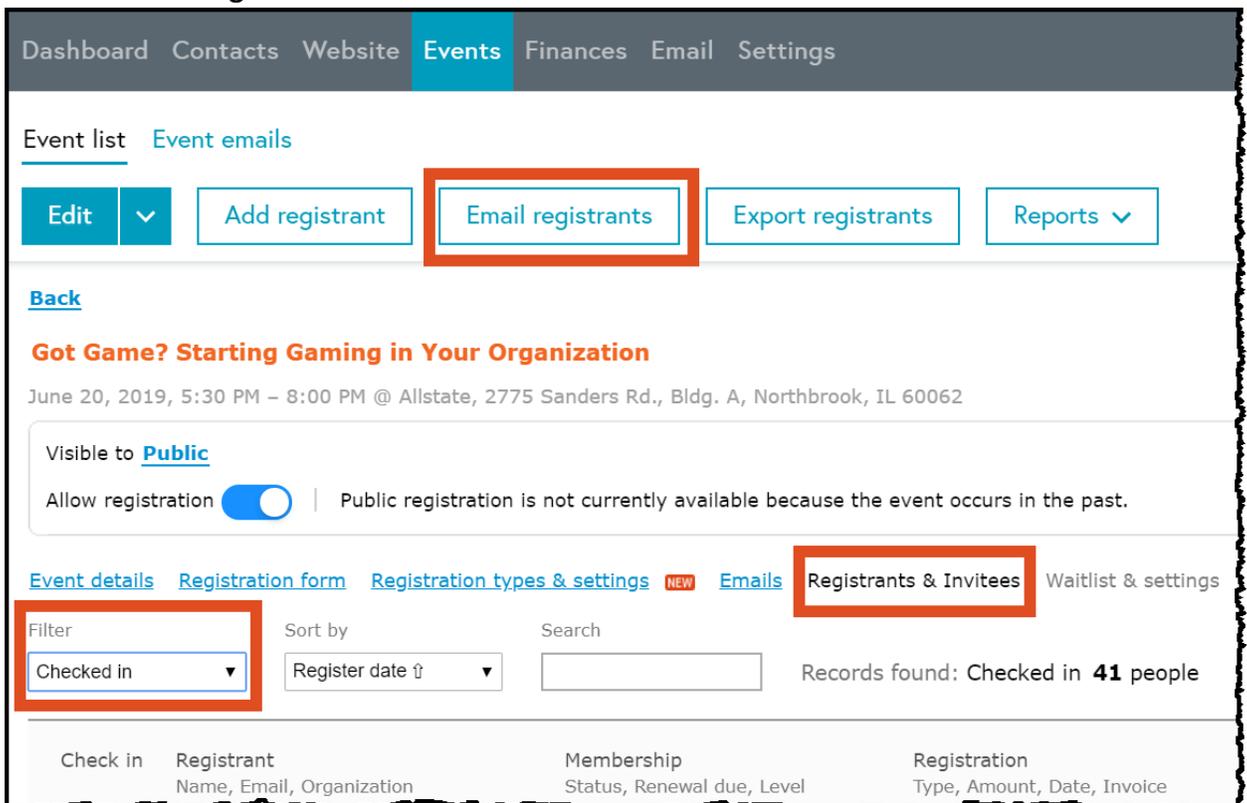
The day after an event, an email should be sent to all participants of the event thanking them for their attendance. This email serves as a record that they not only registered, but were present at the event.

To send the email:

1. Locate and select the event in Wild Apricot from the **Events List** page.



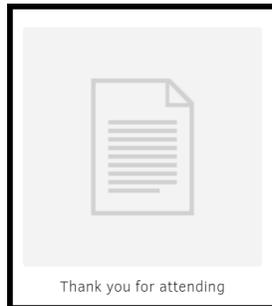
2. Click **Registrants & Invitees**.
3. Filter the list to include only **Checked In** registrants.
4. Click the **Email registrants** button.



5. There are five steps.

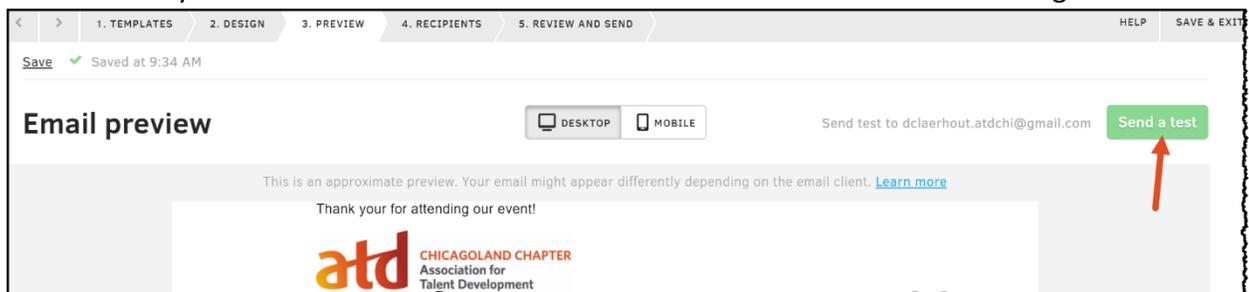


6. In the **Template** step, select the **Thank you for attending** email template.



7. In the **Design** step, **edit** the name of the event and any other details necessary.

8. In the **Preview** step, review the email (both desktop and mobile versions) and send a test email to yourself. Proofread it and check that all links are correct and working.



9. In the **Recipients** area:

- a. The **Recipients** should be set to **Selected registrants**.
- b. Update the **Subject** of the email to **“Thank you for attending our event!”**
- c. Ensure the **Reply to:** is set to **Kristin DeGroot**.
- d. Ensure the **Tracking** check box is checked.

1. TEMPLATES 2. DESIGN 3. PREVIEW 4. RECIPIENTS 5. REVIEW AND SEND

Save ✓ Saved at 9:37 AM

Choose recipients and subject

Recipients: Selected registrants (July 02, 2019 9:30 AM) (41) a

+ Contact + Contact list [Clear all recipients](#)

Subject: b

Type { to see available macros

Reply to: c [Change reply to](#)

Tracking: d Enable link and open email tracking

10. In the **Review and Send** step:

- a. Send it now or schedule it for later. The best practice is to send it out by 9:00am the day following the event.
- b. Edit any details, if necessary.
- c. Click **Send** (or Schedule if scheduling it for later).

1. TEMPLATES 2. DESIGN 3. PREVIEW 4. RECIPIENTS 5. REVIEW AND SEND HELP SAVE & EXIT

Save ✓ Saved at 9:40 AM

Delivery setup

Send c

When to send

Send it now a

Schedule for later

Recipients and subject [Edit](#)

Send to: 41 recipient(s)
41 contact(s) included with undefined opt-in status

Subject: Thank you for attending our event! b

Reply to: DeGroot, Kristin <admin@atdchi.org>

Tracking: Enabled until September 30, 2019

Design [Edit](#)

This is an approximate preview. Your email might appear differently depending on the email client. [Learn more](#)

Thank you for attending our event!



Quick Reference

After you're comfortable with the process to set up events, use this quick reference section to provide quick access to key information dates for each type of event.

Live Networking Events	Webinars	PDN	CETS	Employee Learning Week	Holiday Celebration
Description (information to include)					
Session description Light buffet will be served Agenda Fee Table Presenter Pic & Bio Sponsor Info Cancellation Policy	Session description Fee Table Presenter Pic & Bio Sponsor Info Cancellation Policy	Session description Location, Time, Agenda Registration Details Presenter Pic & Bio	CETS will provide the description, but typically includes: Description Registration link Who should attend Call for Volunteers	Intro description to ELW Session description Presenter Pic & Bio Fee Table Sponsor Info Cancellation Policy	Session description Food description (dinner, buffet, apps, etc.) Agenda Fee Table Sponsor Info Cancellation Policy
Tags					
Networking	Webinar	Choose one: • coaching-pdn • corp_u_pdn • odn • pdn	Networking, conference	Webinar, Networking	Networking
Registration Limit					
100 *Unless the venue has more limited or greater capacity.	95	N/A	N/A	100, unless otherwise negotiated	100 *Unless the venue has more limited or greater capacity.
Registration Types					
<ul style="list-style-type: none"> • Board Member & Special Guest Early Bird • Board Member & Special Guest <hr/> • Member Early Bird • Member <hr/> • Non-member Early Bird • Non-member <hr/> • Student Member Early Bird • Student Member 	Member Non-member	N/A	N/A	Same as webinar	Same as live networking, but exclude student rate.

Available Period (key dates)					
Early Bird Start Date: 6 weeks prior to the event	Start date: 6 weeks prior to the event	N/A	N/A	Same as webinar	Same as live networking
Early Bird End Date: 2 weeks before the event	End date: 3 days before the event				
Regular Start Date: Day after early bird ends					
Regular End Date: 3 days before the event					
Announcement Schedule					
Announcement 1: Scheduled 6 weeks (42 days) before the event.	Same as live networking	N/A	N/A	Same as live networking	Same as live networking
Announcement 2: Scheduled 3 weeks (21 days) before the event.					
Announcement 3: Scheduled 1 week (7 days) before the event.					
Reminder Schedule					
Reminder 1: Scheduled one month (30 days) before the event.	Same as live networking.	N/A	N/A	Same as webinar	Same as live networking
Reminder 2: Scheduled two weeks (14 days) before the event.	Note that Reminder 3 should contain webinar link and dial-in details.				
Reminder 3: Scheduled two days before the event.					
Event Registration Confirmed Email					
Sent to registrant and event organizer after registration was paid or confirmed by administrator.	Same as live networking. Note that confirmation	N/A	N/A	Same as webinar	Same as live networking



	email should contain webinar link and dial-in details.				
Make Event Visible					
Make Visible to Public	Make Visible to Public	Make Visible to Public	Make Visible to Public	Make Visible to Public	Make Visible to Public
Allow Registration					
Yes	Yes	No	No	Yes	Yes