Wild Apricot User Guide

HOW TO SETUP EVENTS IN WILD APRICOT

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.

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.
Edit the following information:

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

<table>
<thead>
<tr>
<th>Live Networking Events</th>
<th>Webinars</th>
<th>PDNs</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>networking</em></td>
<td><em>webinar</em></td>
<td><em>coaching-pdn</em></td>
</tr>
<tr>
<td></td>
<td></td>
<td><em>corp_u_pdn</em></td>
</tr>
<tr>
<td></td>
<td></td>
<td><em>odn</em></td>
</tr>
<tr>
<td></td>
<td></td>
<td><em>odn</em></td>
</tr>
<tr>
<td></td>
<td></td>
<td><em>pdn</em></td>
</tr>
</tbody>
</table>

**Mandatory fields**

**Basic information**

- **Title**: Got Game? Starting Gaming in Your Organization
- **Event URL**: [https://atdchi.org/event-3276617](https://atdchi.org/event-3276617)
- **Tags**: networking

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

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
- wipl
- workshop
• **When and where**
  
a. **Location** – Type the appropriate information, based on the type of event. See table.

<table>
<thead>
<tr>
<th>Live Networking &amp; PDN Events</th>
<th>Webinars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add the university or business name and the exact address, as well as any building numbers that might be helpful.</td>
<td>Webinar</td>
</tr>
</tbody>
</table>

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.

- **List of event registrants**
  - Use these settings:

- **Guest registration**
  - Use this setting:
• **Description** – Copy and paste the event description into the open text field with the following information, based on the type of event:

<table>
<thead>
<tr>
<th>Live Networking Events</th>
<th>Webinars</th>
<th>PDNs</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Description of Event</td>
<td>• Description of Event</td>
<td>• Description of Event</td>
</tr>
<tr>
<td>• Light buffet dinner will be served</td>
<td>• Fee Schedule (this should align with the registration types and settings area)</td>
<td>• Location, Time, Agenda</td>
</tr>
<tr>
<td>• Agenda</td>
<td>• Presenter Info</td>
<td>• Registration Details (incl. Fees if appropriate)</td>
</tr>
<tr>
<td>• Fee Schedule (this should align with the registration types and settings area)</td>
<td>• Sponsor Info</td>
<td>• Presenter Info</td>
</tr>
<tr>
<td>• Presenter Pic &amp; Bio</td>
<td>• Cancellation Policy</td>
<td></td>
</tr>
<tr>
<td>• Sponsor Info</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Cancellation Policy</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.

To avoid formatting issues when copying and pasting, follow one of these options.
- 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:

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

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 the 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.

<table>
<thead>
<tr>
<th>Live Networking Events</th>
<th>Webinars</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>95</td>
</tr>
<tr>
<td>*Unless the venue has more limited or greater capacity.</td>
<td></td>
</tr>
</tbody>
</table>

   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:

<table>
<thead>
<tr>
<th>Live Networking Events</th>
<th>Webinars</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Notice that each type has an early bird rate and a regular (aka late registration) rate.*</td>
<td></td>
</tr>
<tr>
<td>- Board Member &amp; Special Guest Early Bird</td>
<td>- Member</td>
</tr>
<tr>
<td>- Board Member &amp; Special Guest</td>
<td>- Non-member</td>
</tr>
<tr>
<td>- Member Early Bird</td>
<td></td>
</tr>
<tr>
<td>- Member</td>
<td></td>
</tr>
<tr>
<td>- Non-member Early Bird</td>
<td></td>
</tr>
<tr>
<td>- Non-member</td>
<td></td>
</tr>
<tr>
<td>- Student Member Early Bird</td>
<td></td>
</tr>
<tr>
<td>- Student Member</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Registration types</th>
<th>Price (USD)</th>
<th>Availability</th>
<th>Guest registrations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board Member &amp; Special Guests Early-Bird</td>
<td>25.00</td>
<td>Registration code required + from May 09, 2019 through June 02, 2019 (18 days before start of event)</td>
<td></td>
</tr>
<tr>
<td>Board Members &amp; Special Guests</td>
<td>30.00</td>
<td>Registration code required + from June 03, 2019 through June 17, 2019 (3 days before start of event)</td>
<td></td>
</tr>
<tr>
<td>Member Early-Bird</td>
<td>30.00</td>
<td>Limited access + from May 09, 2019 through June 02, 2019 (18 days before start of event)</td>
<td></td>
</tr>
<tr>
<td>Members</td>
<td>45.00</td>
<td>Limited access + from June 03, 2019 through June 17, 2019 (3 days before start of event)</td>
<td></td>
</tr>
<tr>
<td>Non-Member</td>
<td>60.00</td>
<td>Public access + from June 03, 2019 through June 17, 2019 (3 days before start of event)</td>
<td></td>
</tr>
<tr>
<td>Non-Member Early-Bird</td>
<td>45.00</td>
<td>Public access + from May 09, 2019 through June 02, 2019 (18 days before start of event)</td>
<td></td>
</tr>
<tr>
<td>Student Member</td>
<td>40.00</td>
<td>Limited access + from June 03, 2019 through June 17, 2019 (3 days before start of event)</td>
<td></td>
</tr>
<tr>
<td>Student Member Early-Bird</td>
<td>25.00</td>
<td>Limited access + from May 09, 2019 through June 02, 2019 (18 days before start of event)</td>
<td></td>
</tr>
</tbody>
</table>
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**:

<table>
<thead>
<tr>
<th>Live Networking Events</th>
<th>Webinars</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>For Early Bird</strong>: The <em>start date</em> should be the day registration opens (6 weeks prior to the event). The <em>end date</em> should be roughly 2 weeks before the event.</td>
<td>The <em>start date</em> should be the day registration opens (6 weeks prior to the event). The <em>end date</em> should be the date that no more registrations will be accepted (typically 3 days before the event itself).</td>
</tr>
<tr>
<td><strong>For Regular</strong>: The <em>start date</em> should be the next day after the early bird end date. The <em>end date</em> should be the date that no more registrations will be accepted (typically 3 days before the event itself).</td>
<td></td>
</tr>
</tbody>
</table>

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
- **Name**: Board Member & Special Guests Early-Bird
- **Description**:
- **Base price**: $25.00 (USD)
- **Taxes**: Disabled

**Registration type settings**
- **Sold/Limit**: 15 (limit not set)
- **Multiple Registrants**: Allowed for the same contact
- **Cancellation**: Do not allow cancellation by registrants
- **Guests**: Not allowed

**Registration type availability**
- **Availability**: Registration code required (Board2019)
- **Available period**: From May 09, 2019 through June 02, 2019 (18 days before start of event)
- **Display options**: Hide if unavailable
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.

- **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**.

Each of these announcement 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 **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.
• **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.

![Reminder 1 - scheduled](image)

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

![Schedule 1st reminder](image)

! 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.
SPECIAL HANDLING FOR WEBINARS:

- 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.

<table>
<thead>
<tr>
<th>Registration emails</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Event registration confirmed</strong></td>
</tr>
<tr>
<td>Sent after registration was paid or confirmed by administrator</td>
</tr>
<tr>
<td>- Send to registrant</td>
</tr>
<tr>
<td>- Send copy to organizer</td>
</tr>
<tr>
<td><strong>Event registration pending</strong></td>
</tr>
<tr>
<td>Sent after registration was submitted and payment is required</td>
</tr>
<tr>
<td>- Send to registrant</td>
</tr>
<tr>
<td>- Send copy to organizer</td>
</tr>
<tr>
<td><strong>Event registration canceled</strong> – not set</td>
</tr>
<tr>
<td>Sent when registration is canceled by the registrant, by an admin, or automatically</td>
</tr>
<tr>
<td><strong>New waitlist registration</strong> – not set</td>
</tr>
<tr>
<td>Sent when new waitlist registration is confirmed</td>
</tr>
</tbody>
</table>

! Each of these registration emails 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 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:**

<table>
<thead>
<tr>
<th>Check in</th>
<th>Register Name, Email, Organization</th>
<th>Membership Status, Renewal due, Level</th>
<th>Registration Type, Amount, Date, Invoice</th>
<th>Payment status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Bank, Robert</td>
<td>Active member 22 Feb 2020 (1a) Regular Member</td>
<td>Member Early-Bird – $30.00 9 May 2019, 6:00 PM Invoice #03926</td>
<td>Paid</td>
</tr>
<tr>
<td></td>
<td>Craig, Daniel</td>
<td>Active member 5 Mar 2020 (1a) Regular Member</td>
<td>Member Early-Bird – $30.00 9 May 2019, 6:19 PM Invoice #03927</td>
<td>Paid</td>
</tr>
<tr>
<td></td>
<td>Tarrall, Evelyn</td>
<td>Active member 27 Dec 2019 (4) Sponsor Member - Gold</td>
<td>Board Member &amp; Special Guests En: 9 May 2019, 9:02 PM Invoice #03930</td>
<td>Paid</td>
</tr>
<tr>
<td></td>
<td>Bernard, Pamela</td>
<td>Active member 30 Feb 2020 (1a) Regular Member</td>
<td>Member Early-Bird – $30.00 10 May 2019, 9:10 PM Invoice #03934</td>
<td>Paid</td>
</tr>
<tr>
<td></td>
<td>Rigby, Colin</td>
<td>Active member 5 Oct 2019 (1a) Regular Member</td>
<td>Member Early-Bird – $30.00 13 May 2019, 9:58 AM Invoice #03941</td>
<td>Paid</td>
</tr>
</tbody>
</table>
6. MAKING THE EVENT VISIBLE & ALLOWING REGISTRATION

After you’ve completed all of the above, you’re 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.

<table>
<thead>
<tr>
<th>Live Networking Events</th>
<th>Webinars</th>
<th>PDN Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make Visible to Public</td>
<td>Make Visible to Public</td>
<td>Make Visible to Public</td>
</tr>
<tr>
<td>Allow registration</td>
<td>Allow registration</td>
<td>DO NOT Allow registration</td>
</tr>
</tbody>
</table>

(This is because registration for these events is handled outside of the system.)

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/](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](mailto: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.

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.
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.
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).
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.

<table>
<thead>
<tr>
<th>Live Networking Events</th>
<th>Webinars</th>
<th>PDN</th>
<th>CETS</th>
<th>Employee Learning Week</th>
<th>Holiday Celebration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description (information to include)</td>
<td>Session description</td>
<td>Session description</td>
<td>CETS will provide the description, but typically includes:</td>
<td>Intro description to ELW</td>
<td>Session description</td>
</tr>
<tr>
<td>Light buffet will be served</td>
<td>Fee Table</td>
<td>Location, Time, Agenda</td>
<td>Description</td>
<td>Session description</td>
<td>Food description</td>
</tr>
<tr>
<td>Agenda</td>
<td>Presenter Pic &amp; Bio</td>
<td>Registration Details</td>
<td>Registration link</td>
<td>Presenter Pic &amp; Bio</td>
<td>(dinner, buffet, apps, etc.)</td>
</tr>
<tr>
<td>Fee Table</td>
<td>Sponsor Info</td>
<td>Presenter Pic &amp; Bio</td>
<td>Who should attend</td>
<td>Fee Table</td>
<td>Agenda</td>
</tr>
<tr>
<td>Presenter Pic &amp; Bio</td>
<td>Cancellation Policy</td>
<td>Call for Volunteers</td>
<td>Cancellation Policy</td>
<td>Sponsor Info</td>
<td>Fee Table</td>
</tr>
<tr>
<td>Sponsor Info</td>
<td>Cancellation Policy</td>
<td>Networking, conference</td>
<td>Cancellation Policy</td>
<td>Cancellation Policy</td>
<td></td>
</tr>
</tbody>
</table>

**Tags**

| Networking | Webinar | Choose one: coaching-pdn corp_u_pdn odn pdn | Networking, conference | Webinar, Networking | Networking |

**Registration Limit**

| 100 | 95 | N/A | N/A | 100, unless otherwise negotiated | 100 |
| *Unless the venue has more limited or greater capacity. |

**Registration Types**

| Board Member & Special Guest Early Bird | Member Non-member | N/A | N/A | Same as webinar | Same as live networking, but exclude student rate. |
| Board Member & Special Guest | Member Early Bird | Member | Non-member Early Bird | Non-member | Student Member Early Bird | Student Member |
# Available Period (key dates)

<table>
<thead>
<tr>
<th></th>
<th>Start date: 6 weeks prior to the event</th>
<th>N/A</th>
<th>N/A</th>
<th>Same as webinar</th>
<th>Same as live networking</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Early Bird Start Date:</strong></td>
<td>6 weeks prior to the event</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Early Bird End Date:</strong></td>
<td>2 weeks before the event</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Regular Start Date:</strong></td>
<td>Day after early bird ends</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Regular End Date:</strong></td>
<td>3 days before the event</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

# Announcement Schedule

<table>
<thead>
<tr>
<th>Announcement 1:</th>
<th>Scheduled 6 weeks (42 days) before the event.</th>
<th>Same as live networking</th>
<th>N/A</th>
<th>N/A</th>
<th>Same as live networking</th>
<th>Same as live networking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Announcement 2:</td>
<td>Scheduled 3 weeks (21 days) before the event.</td>
<td>Same as live networking</td>
<td>N/A</td>
<td>N/A</td>
<td>Same as live networking</td>
<td>Same as live networking</td>
</tr>
<tr>
<td>Announcement 3:</td>
<td>Scheduled 1 week (7 days) before the event.</td>
<td>Same as live networking</td>
<td>N/A</td>
<td>N/A</td>
<td>Same as live networking</td>
<td>Same as live networking</td>
</tr>
</tbody>
</table>

# Reminder Schedule

<table>
<thead>
<tr>
<th>Reminder 1:</th>
<th>Scheduled one month (30 days) before the event.</th>
<th>Same as live networking.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Note that Reminder 3 should contain webinar link and dial-in details.</td>
</tr>
<tr>
<td>Reminder 2:</td>
<td>Scheduled two weeks (14 days) before the event.</td>
<td>N/A</td>
</tr>
<tr>
<td>Reminder 3:</td>
<td>Scheduled two days before the event.</td>
<td>N/A</td>
</tr>
</tbody>
</table>

# Event Registration Confirmed Email

<table>
<thead>
<tr>
<th>Sent to registrant and event organizer after registration was paid or confirmed by administrator.</th>
<th>Same as live networking.</th>
<th>N/A</th>
<th>N/A</th>
<th>Same as webinar</th>
<th>Same as live networking</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Note that confirmation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
email should contain webinar link and dial-in details.

<table>
<thead>
<tr>
<th>Make Event Visible</th>
<th>Make Visible to Public</th>
<th>Make Visible to Public</th>
<th>Make Visible to Public</th>
<th>Make Visible to Public</th>
<th>Make Visible to Public</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow Registration</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>